

LATTS

Latin America Trade and Transportation Study

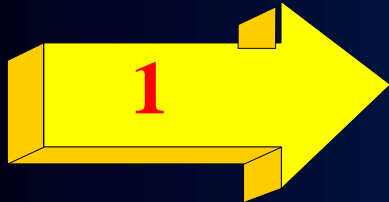
Project Overview

Conference on Updating the
Louisiana Statewide Transportation Plan

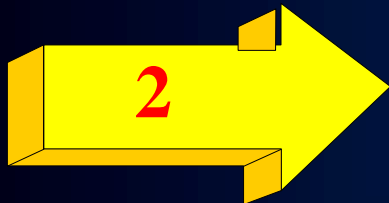
New Orleans, LA
July 31, 2000



LATTS: Purposes

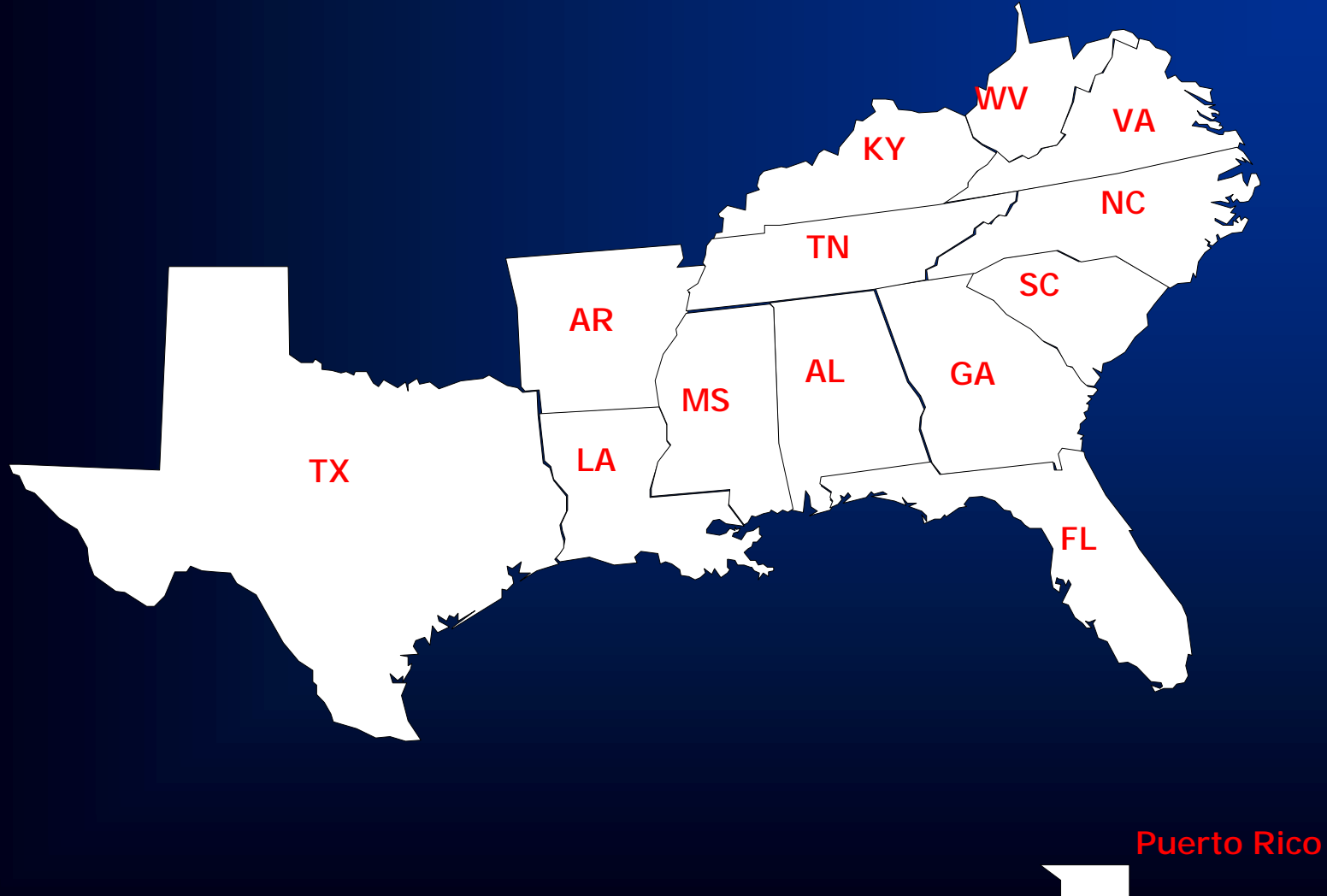


Determine Latin American Trade Opportunities



Identify Transportation Investments to Support Trade Growth

The Alliance Region



Study Regions







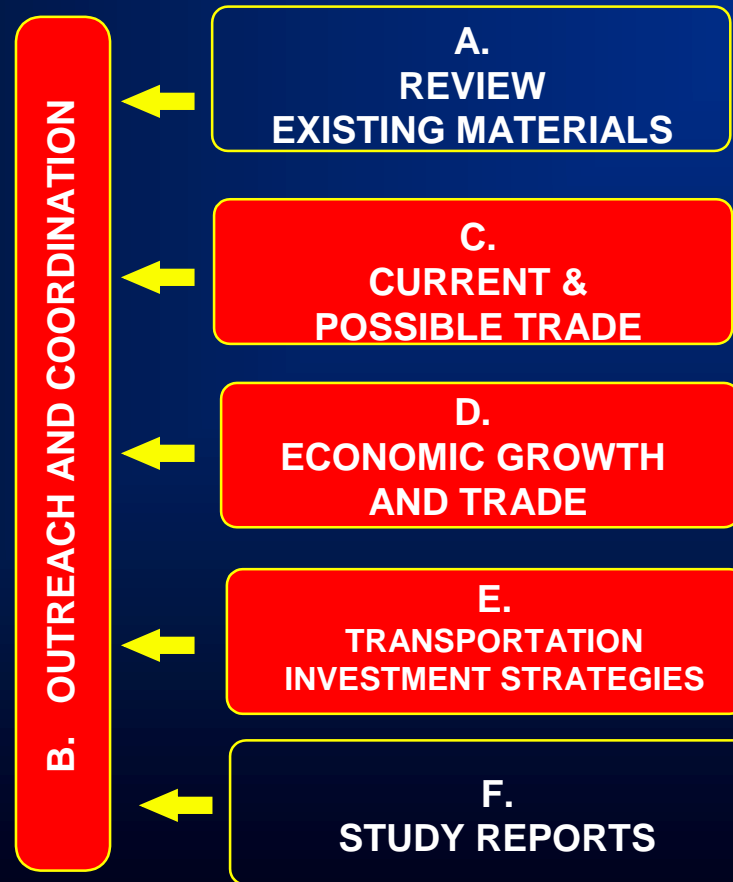
Alliance Trade

- Originate
- Terminate
- Within the Alliance

Gateway Trade

- Passes (Gateways) Through the Alliance

WORK PLAN

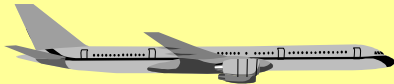


Investment Strategies

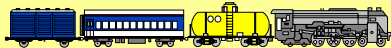


Water Ports

- Coastal
- Inland

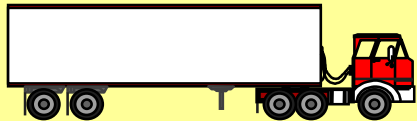


Airports



Rail Lines

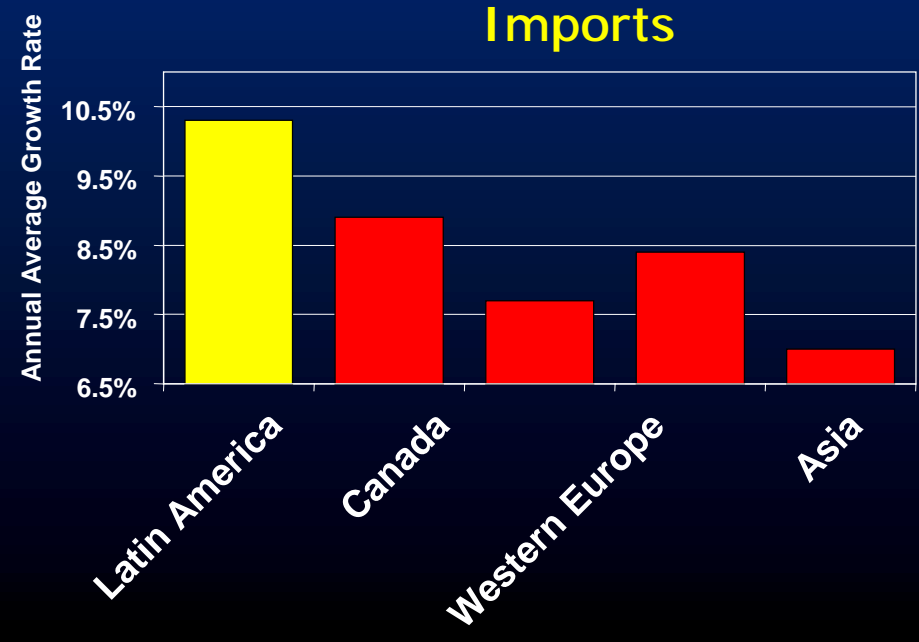
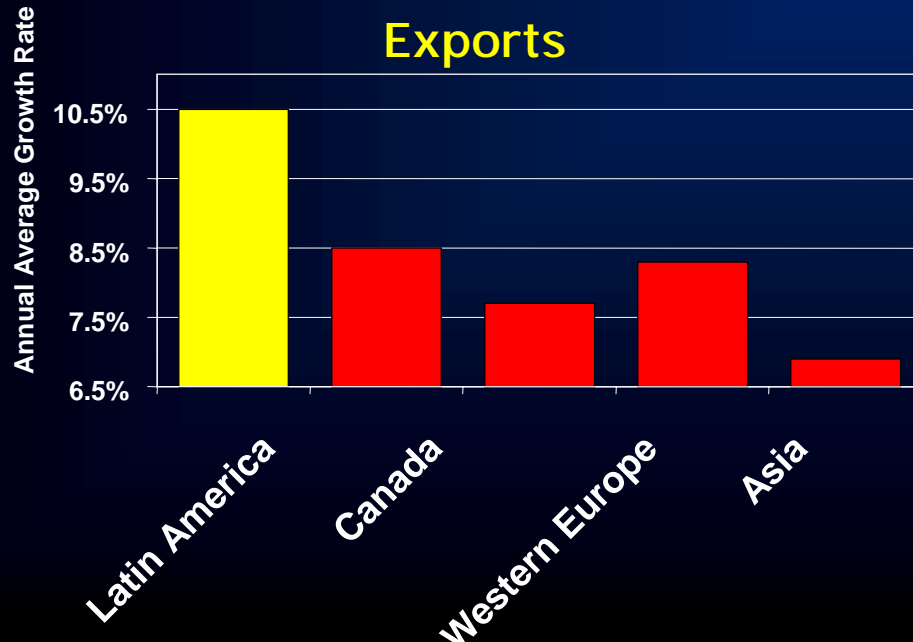
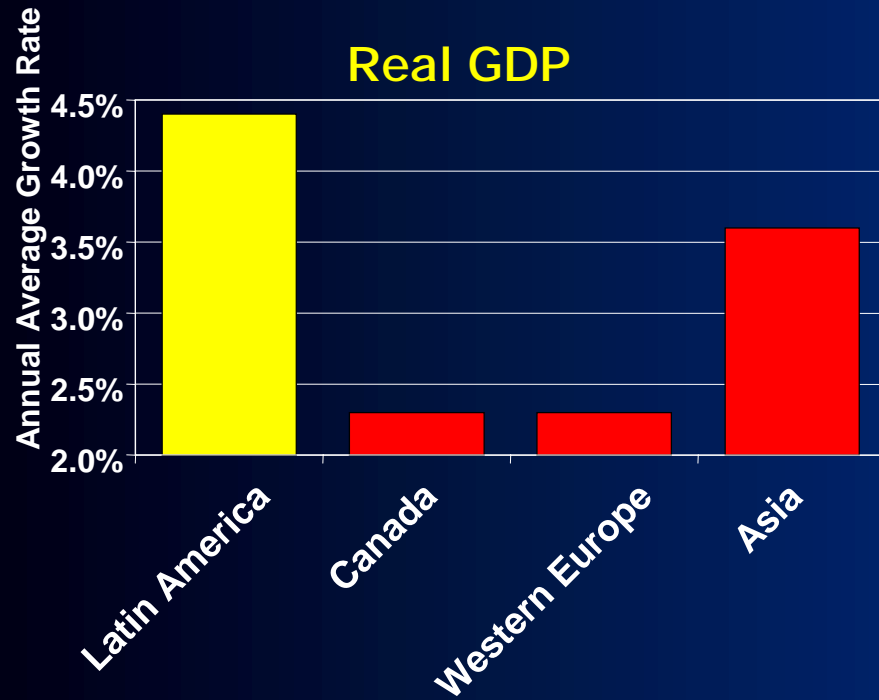
- Include Port Connectors



Highway Corridors

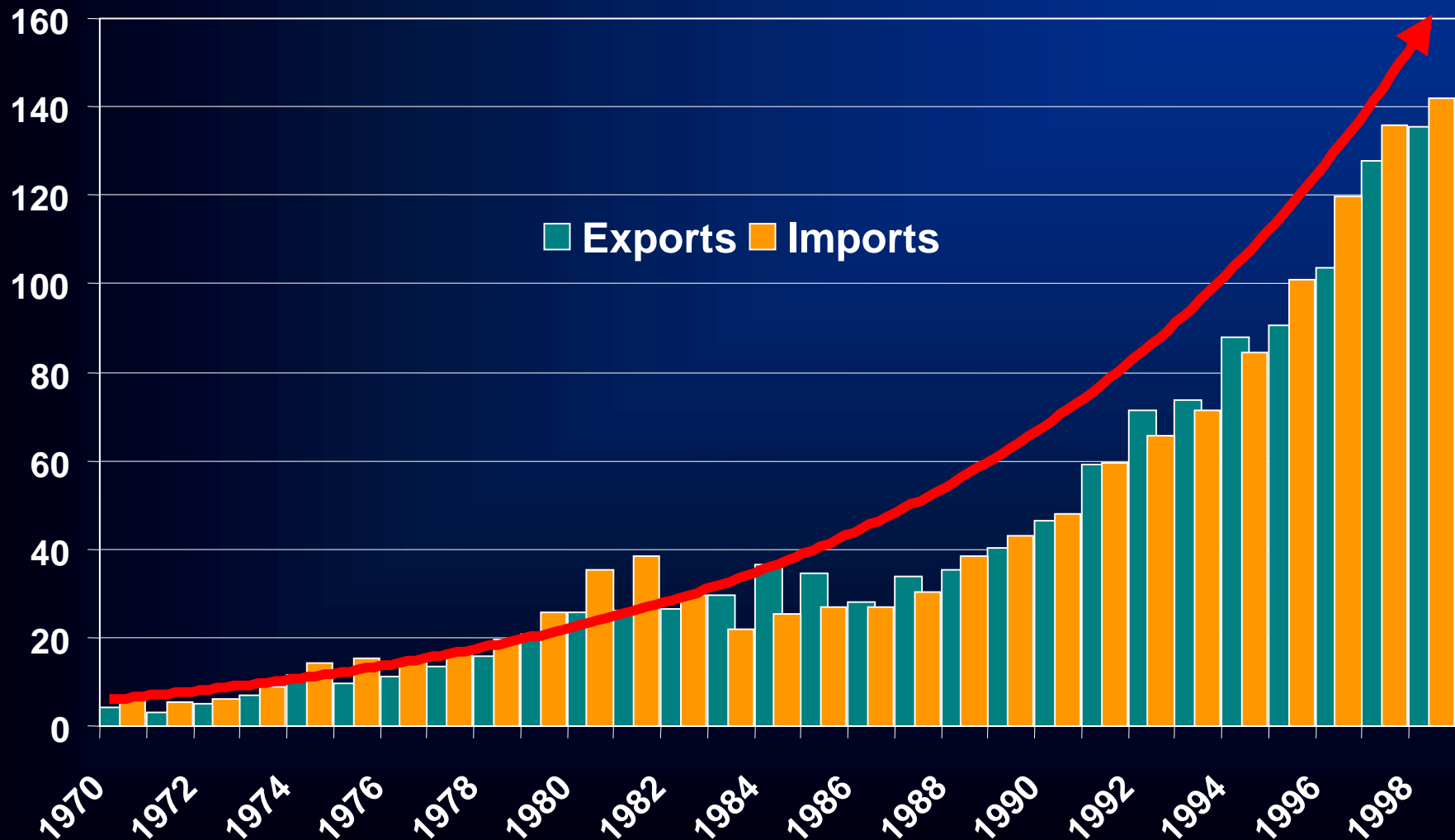
- Include Intermodal Connectors

Indicators of Latin American Growth (Historical)



Trade is Escalating

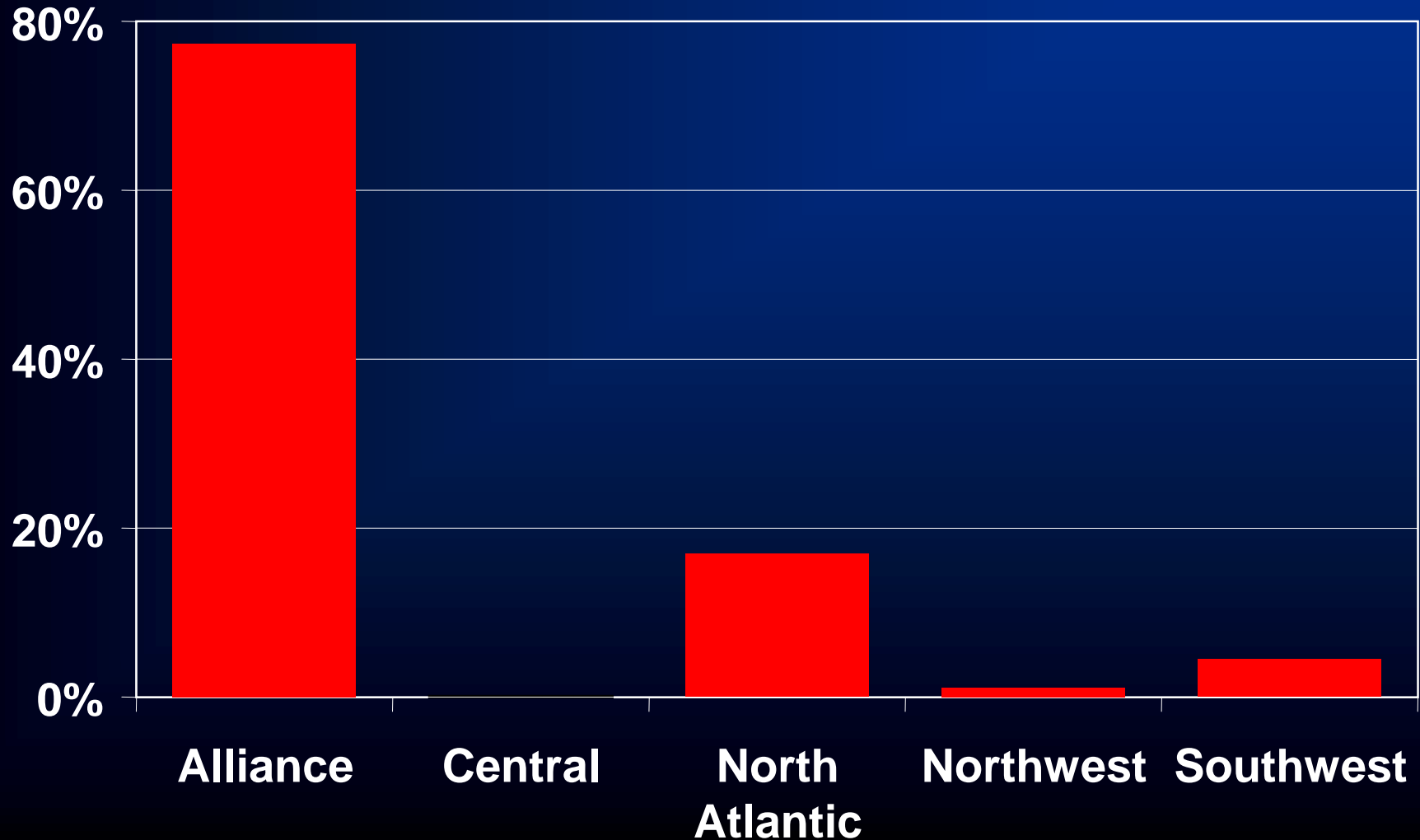
US/Latin American Trade (\$Billion)



The Alliance is The Gateway to Latin America

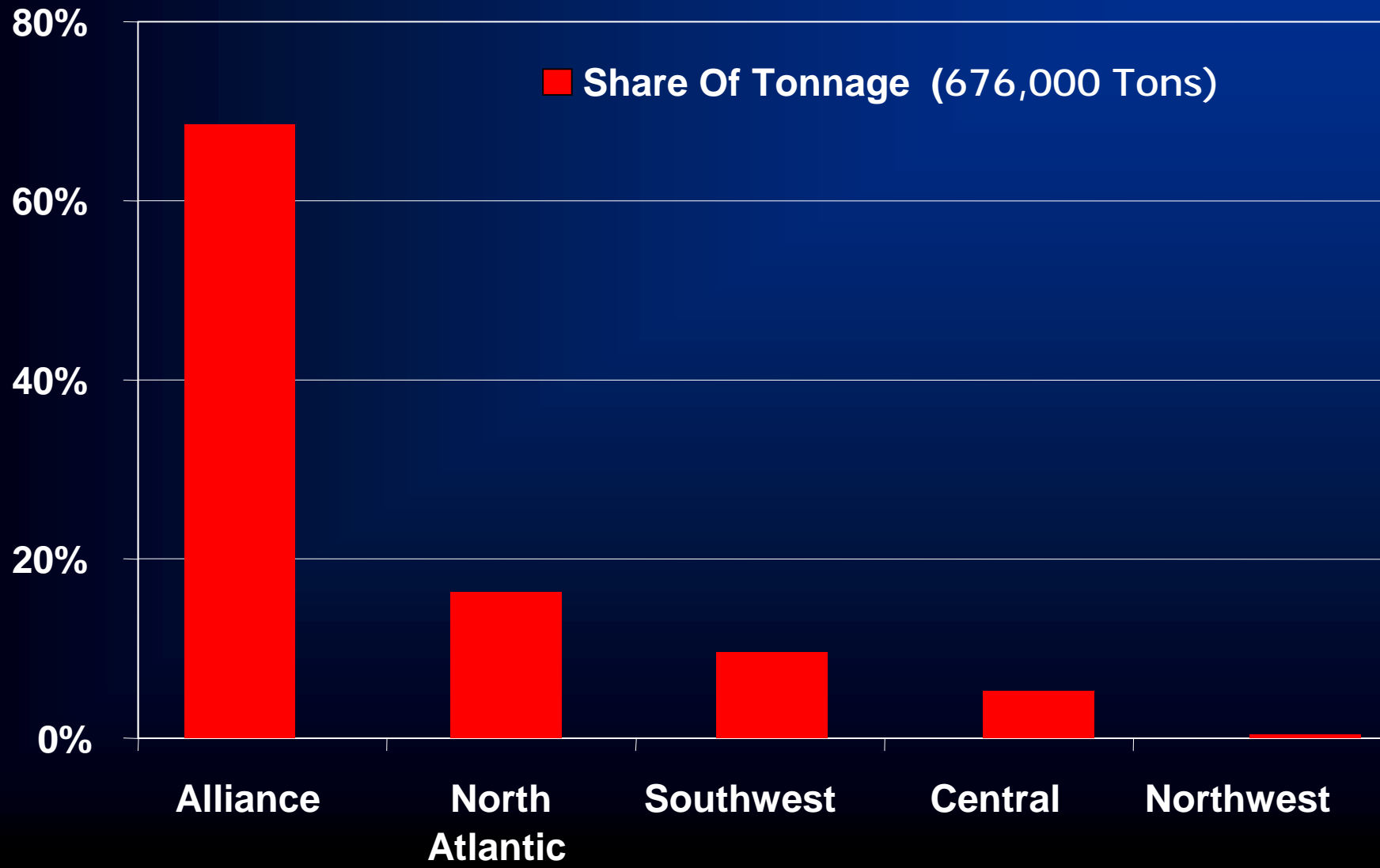
1996 Total Seaborne Trade with Latin America

Based on Tonnage (353 Million Tons)



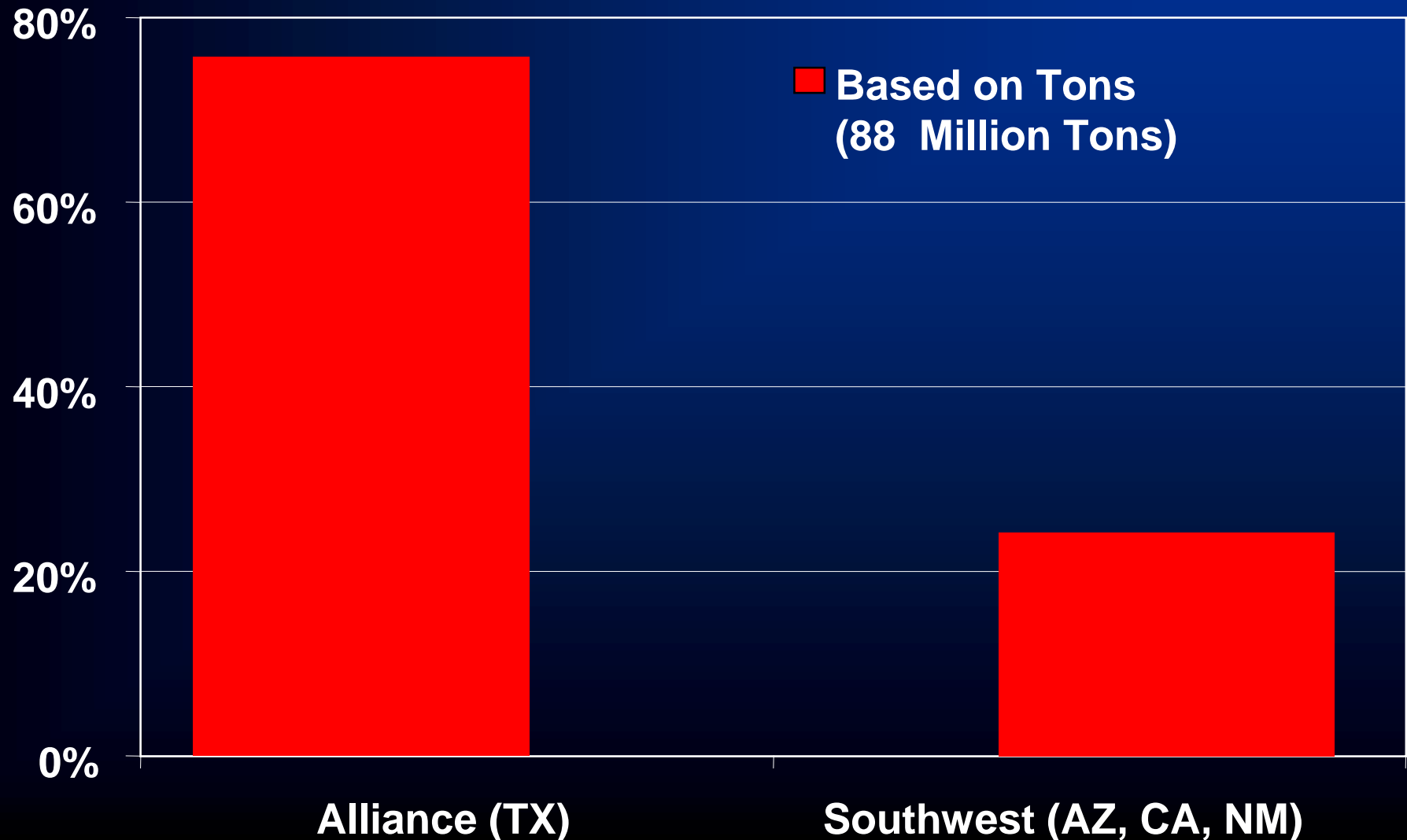
The Alliance is The Gateway to Latin America

1996 Total Airborne Trade with Latin America



The Alliance is The Gateway to Latin America

1996 Total Cross-border Trade with Latin America



Strategically Important: National Economy

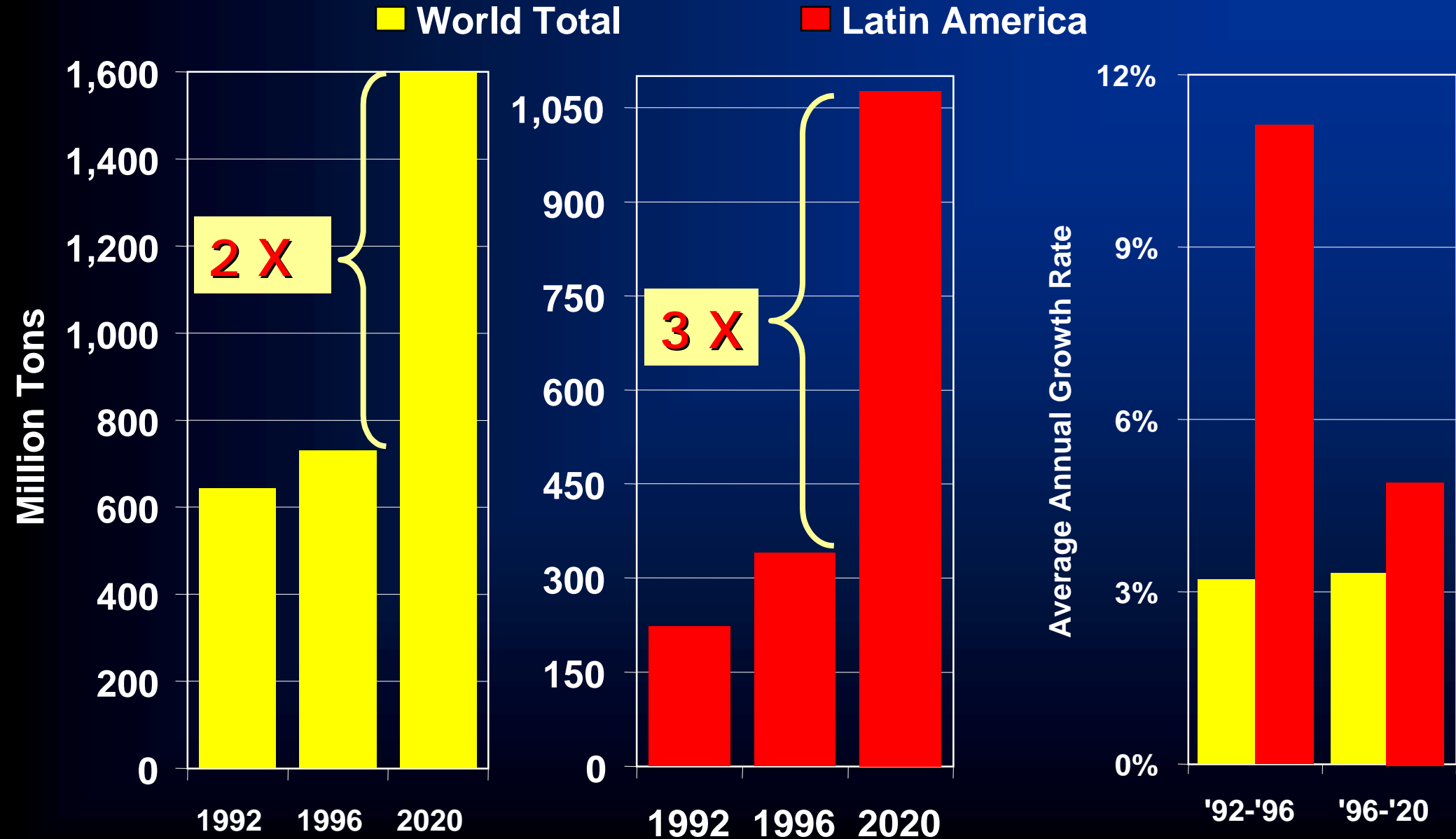
Important Gateway For:

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graph TD; A[Important Gateway For:] --> B([Alliance Trade With Latin America]); A --> C([Rest of US Trade With Latin America])
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**Alliance
Trade With
Latin America**

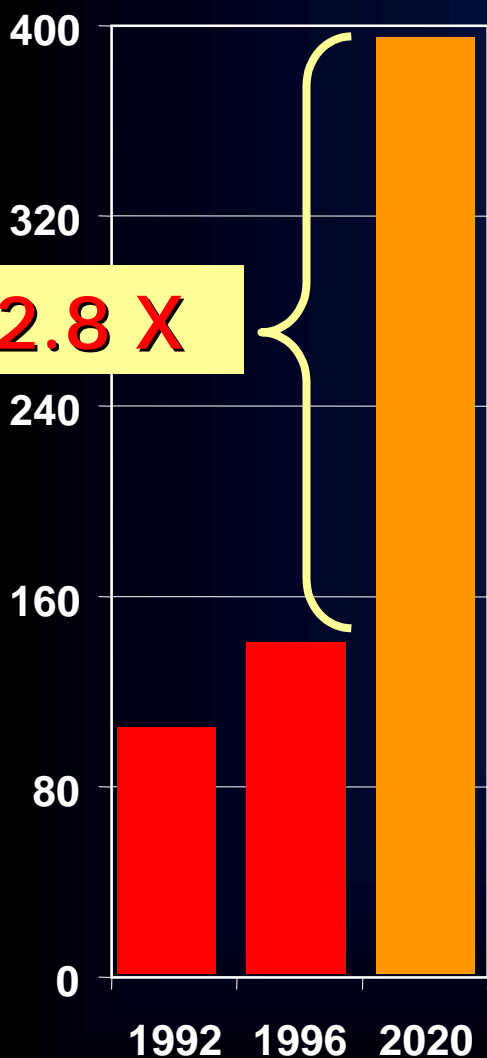
**Rest of US
Trade With
Latin America**

Alliance Trade Growth Trends: Forecasts

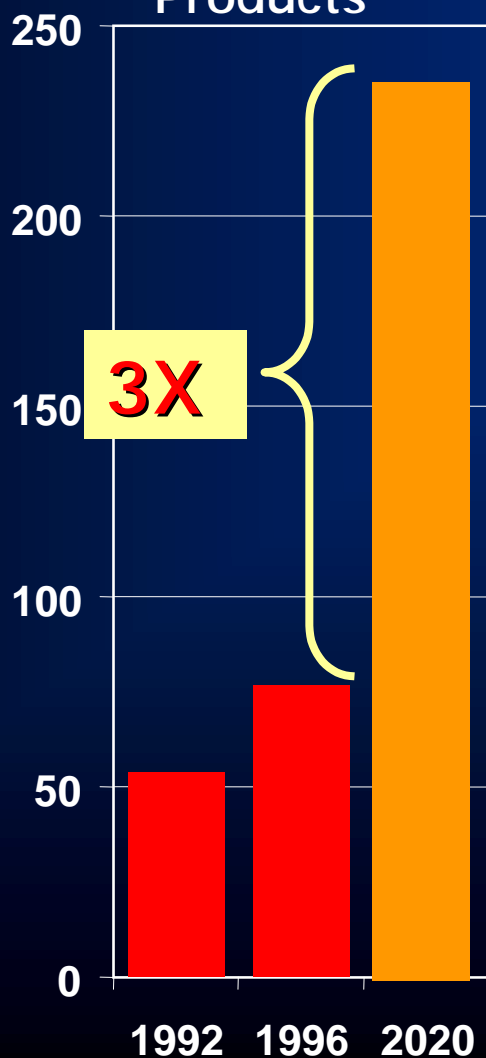


Alliance Trade Growth Trends: Forecasts (Million Tons)

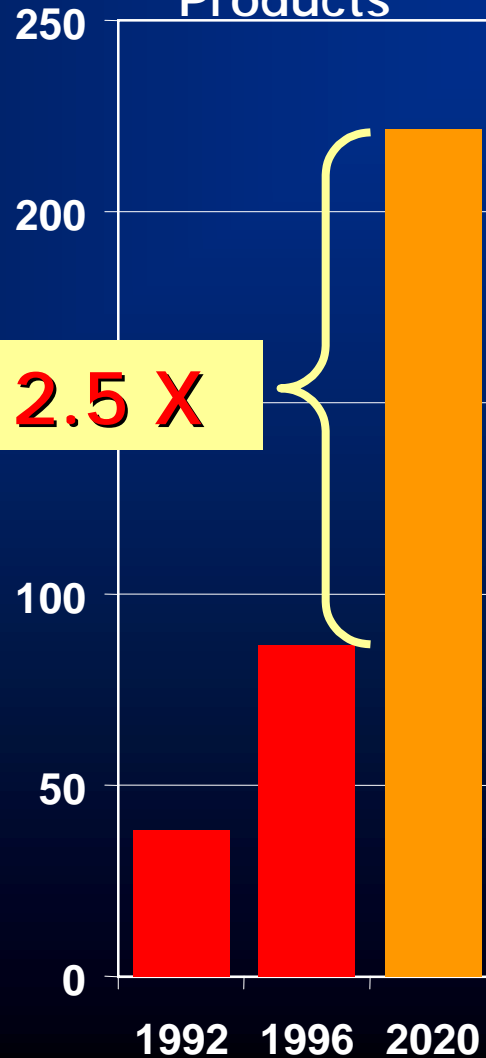
Crude & Petro. Products



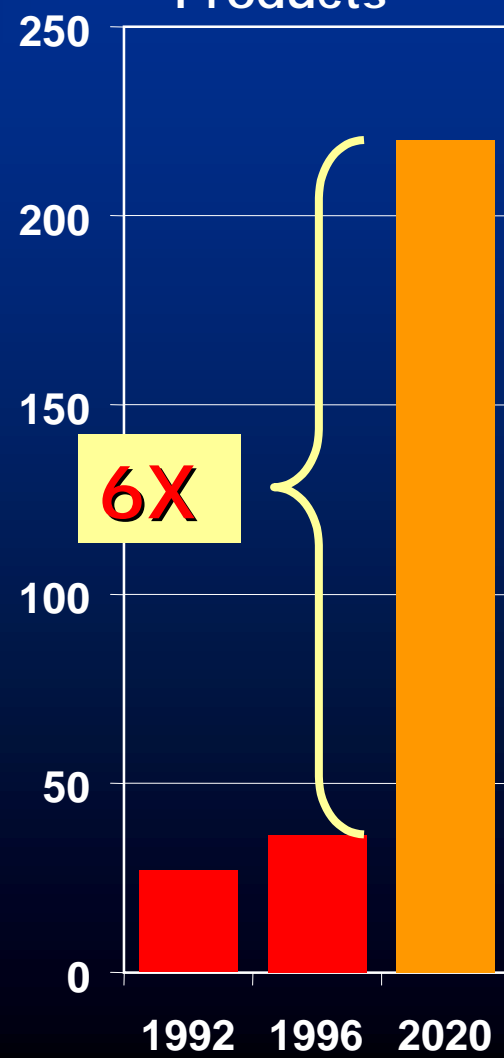
Agric. & Mining Products



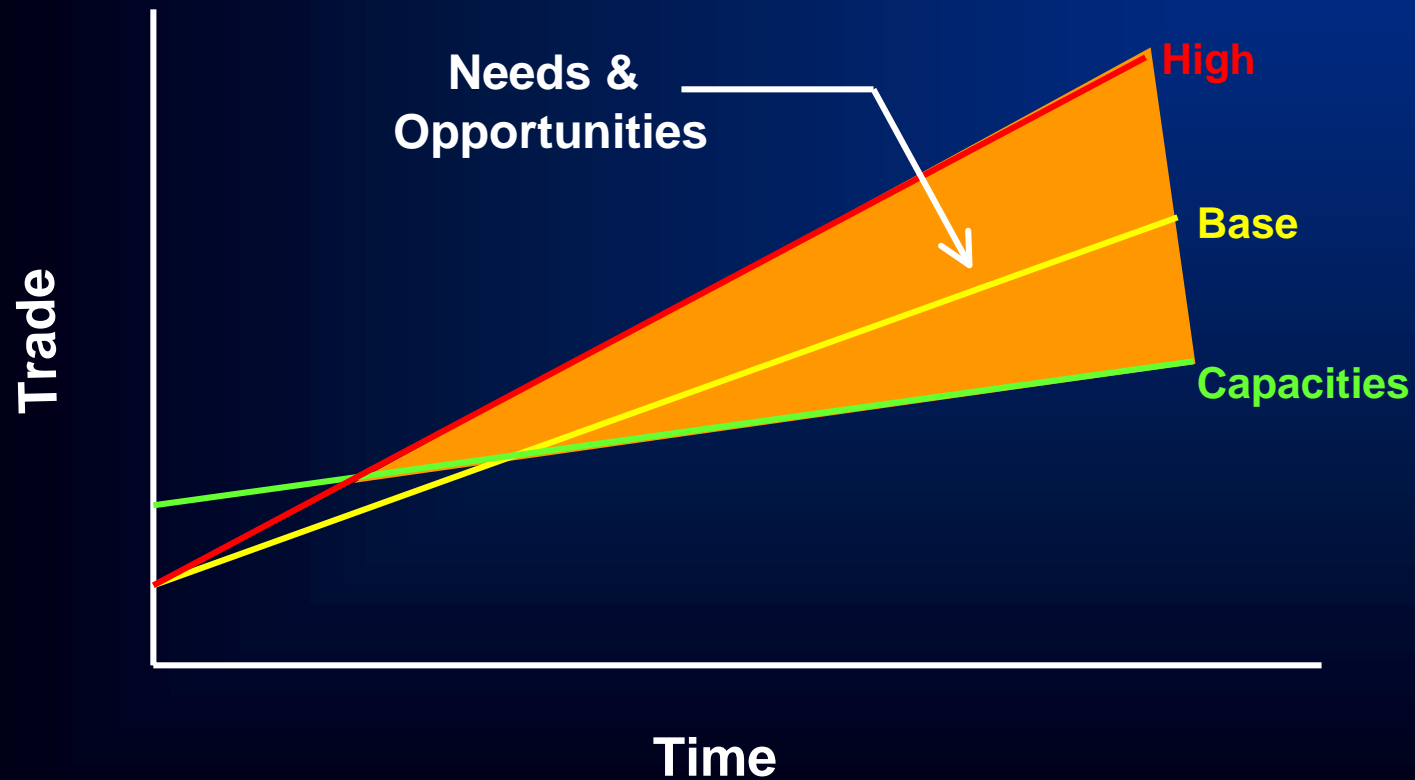
Prim. Manufact'd Products



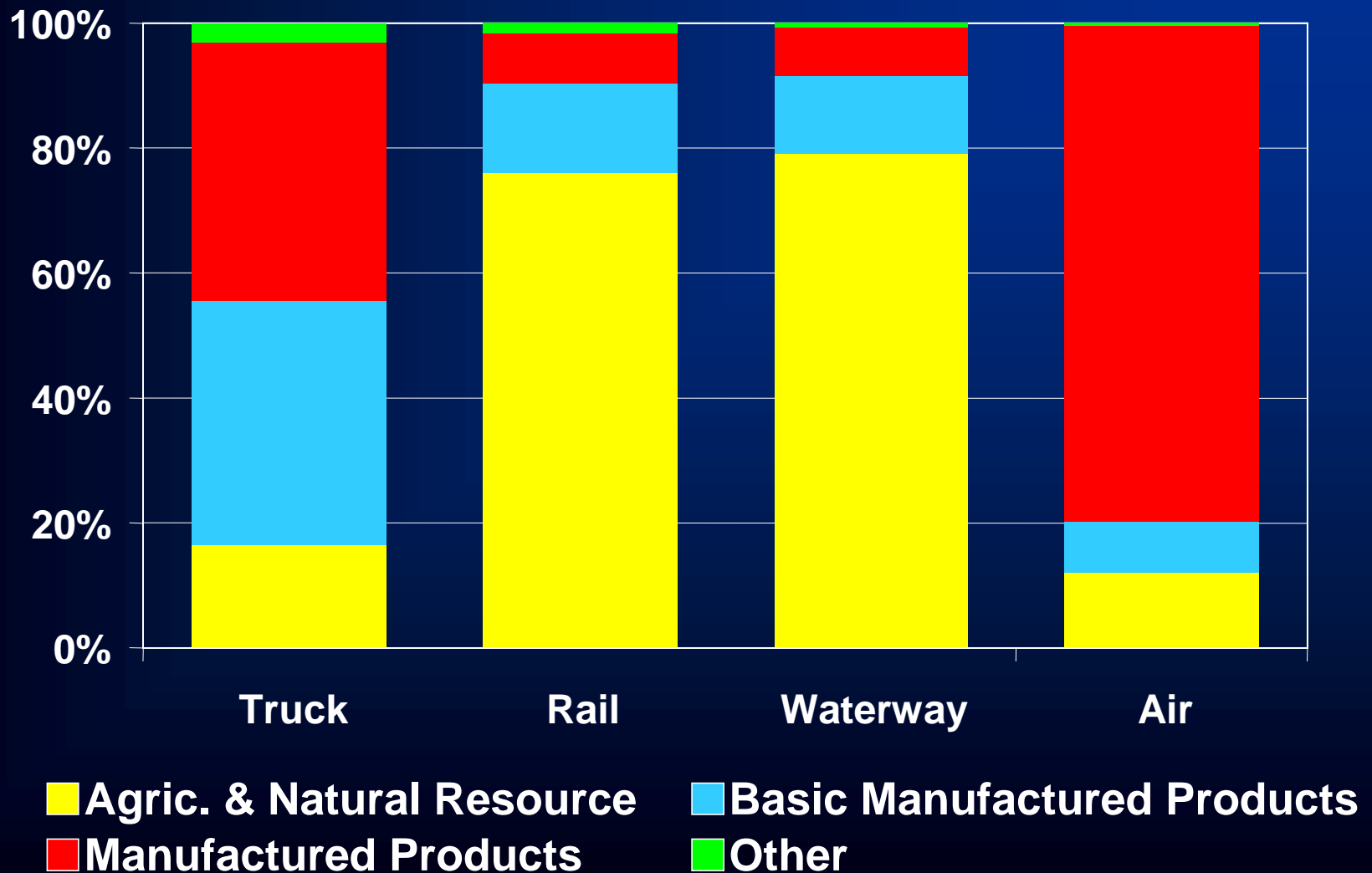
Manufact'd Products



Demand will Exceed Capacity

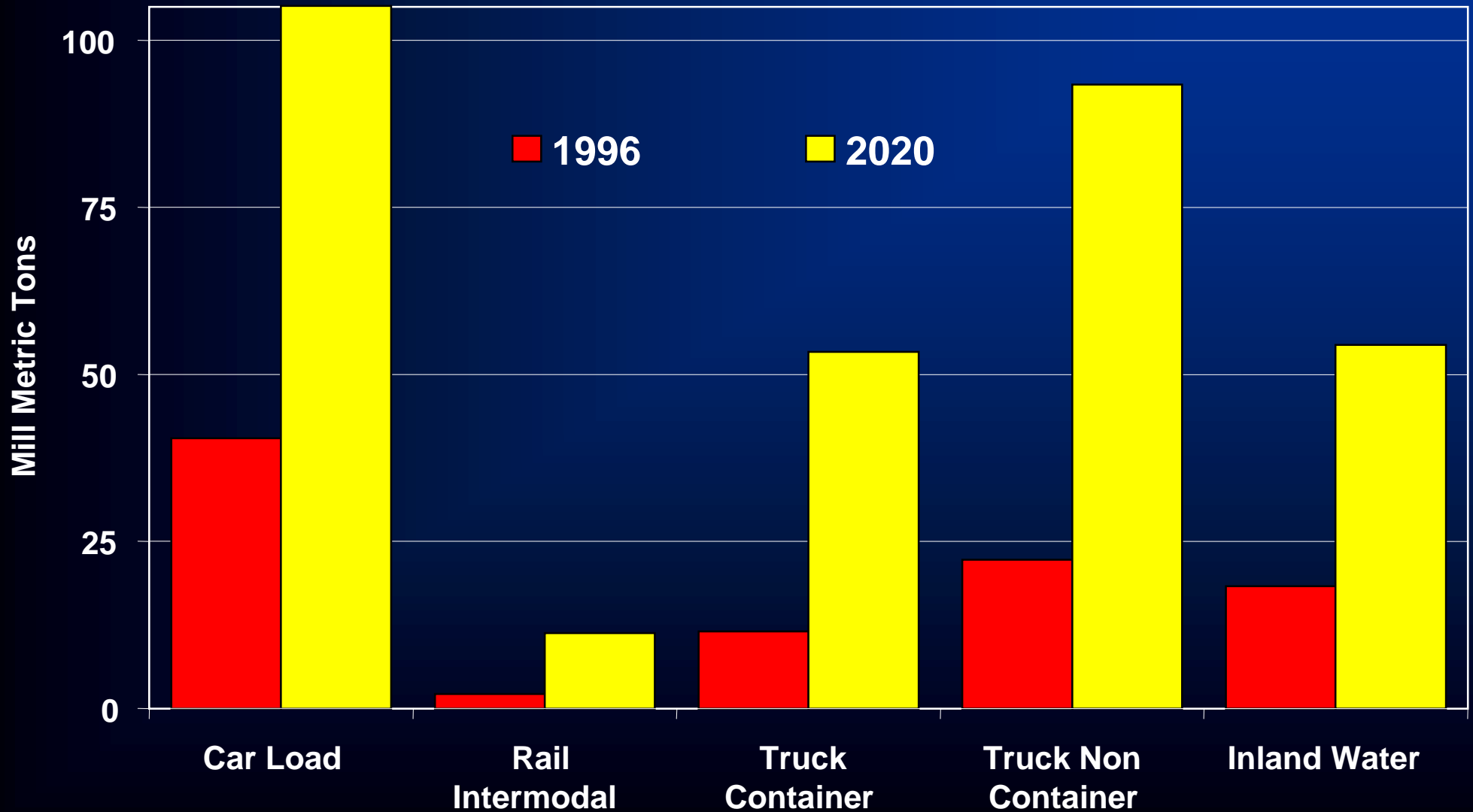


Share of Modal Throughput by Sector For Latin American Trade



2020 Domestic Mode Split Latin American Trade - All Commodities

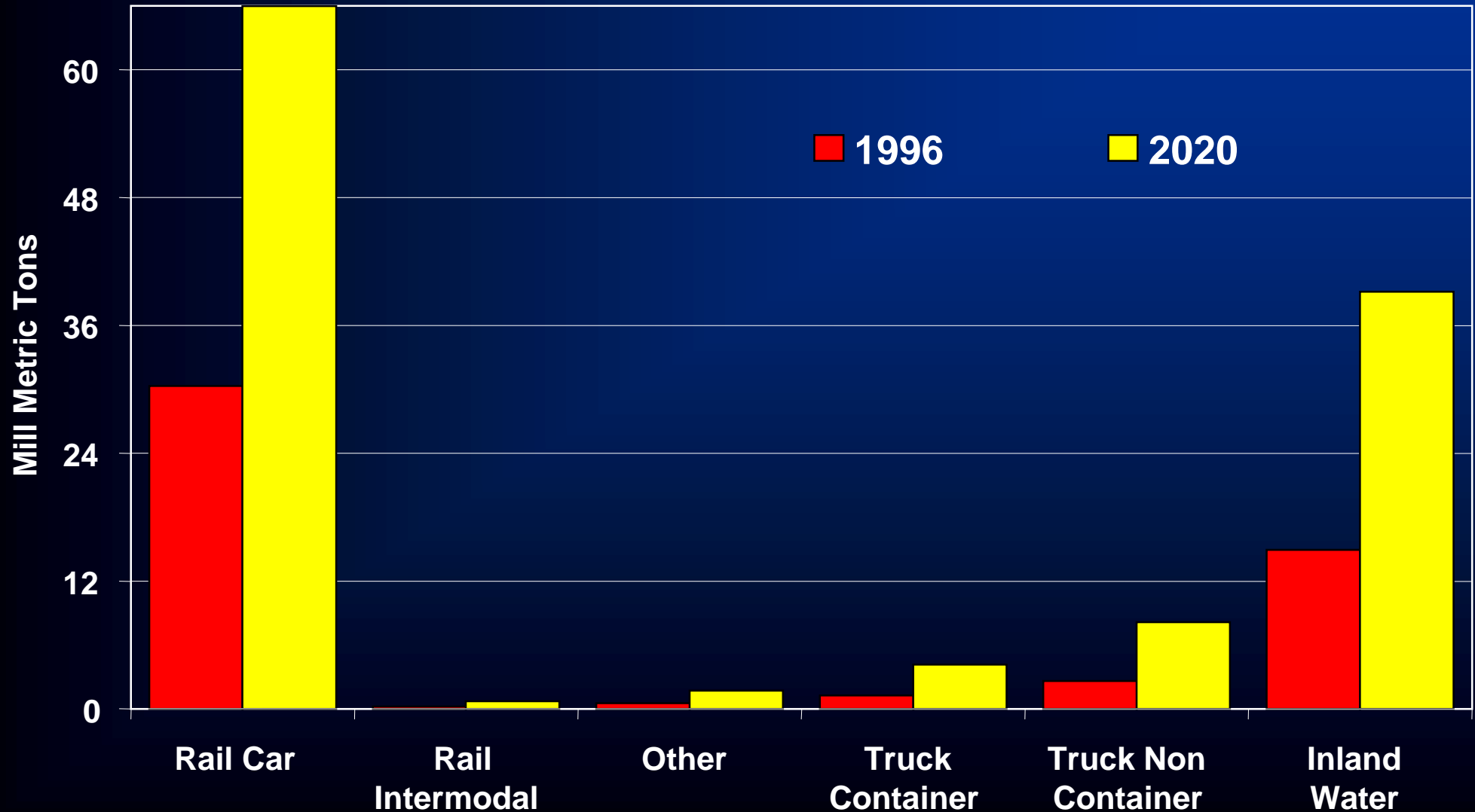
Total Tonnage



2020 Domestic Mode Split

Latin American Trade - Agric. & Nat. Resources

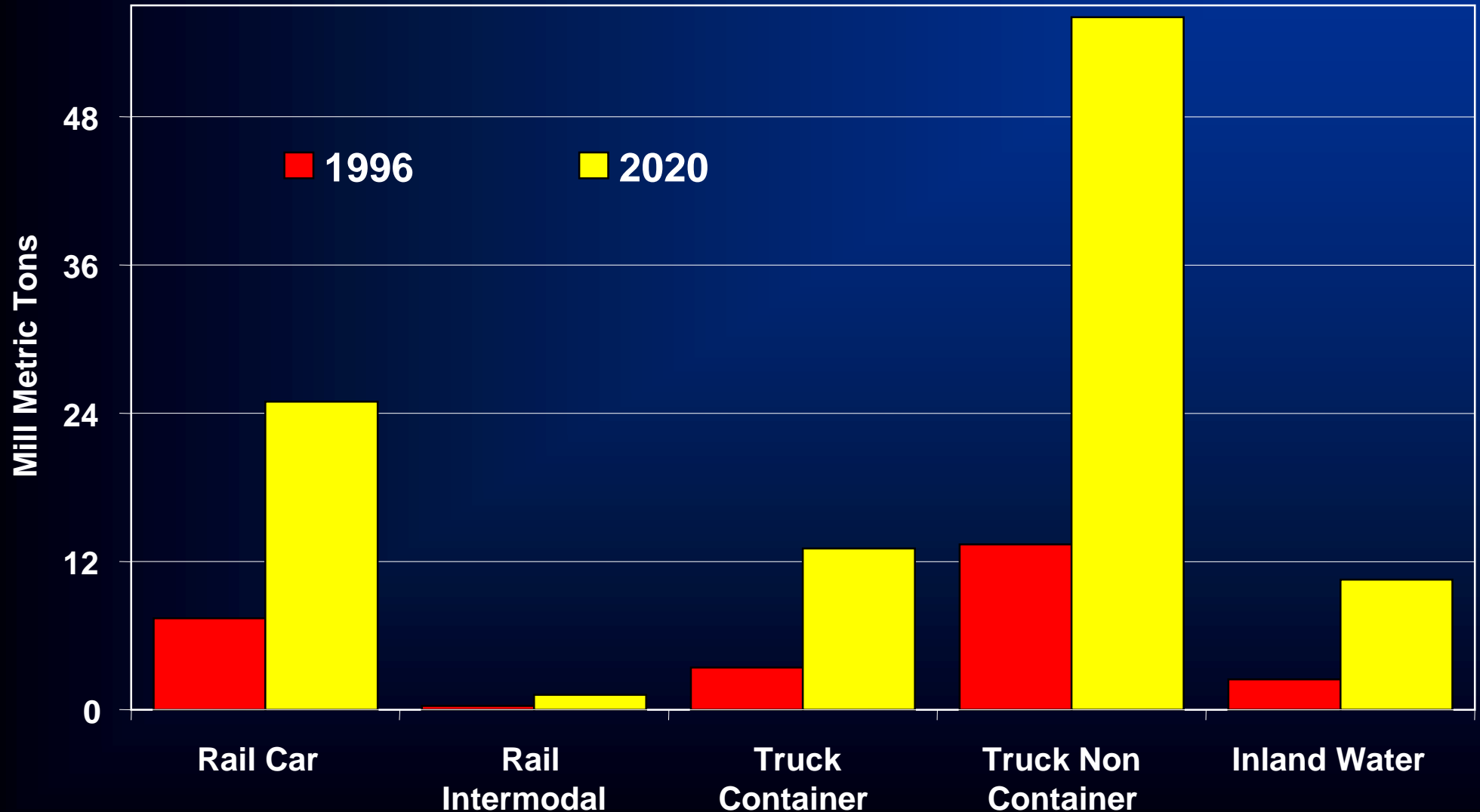
Total Tonnage



2020 Domestic Mode Split

Latin American Trade - Basic Manufactured

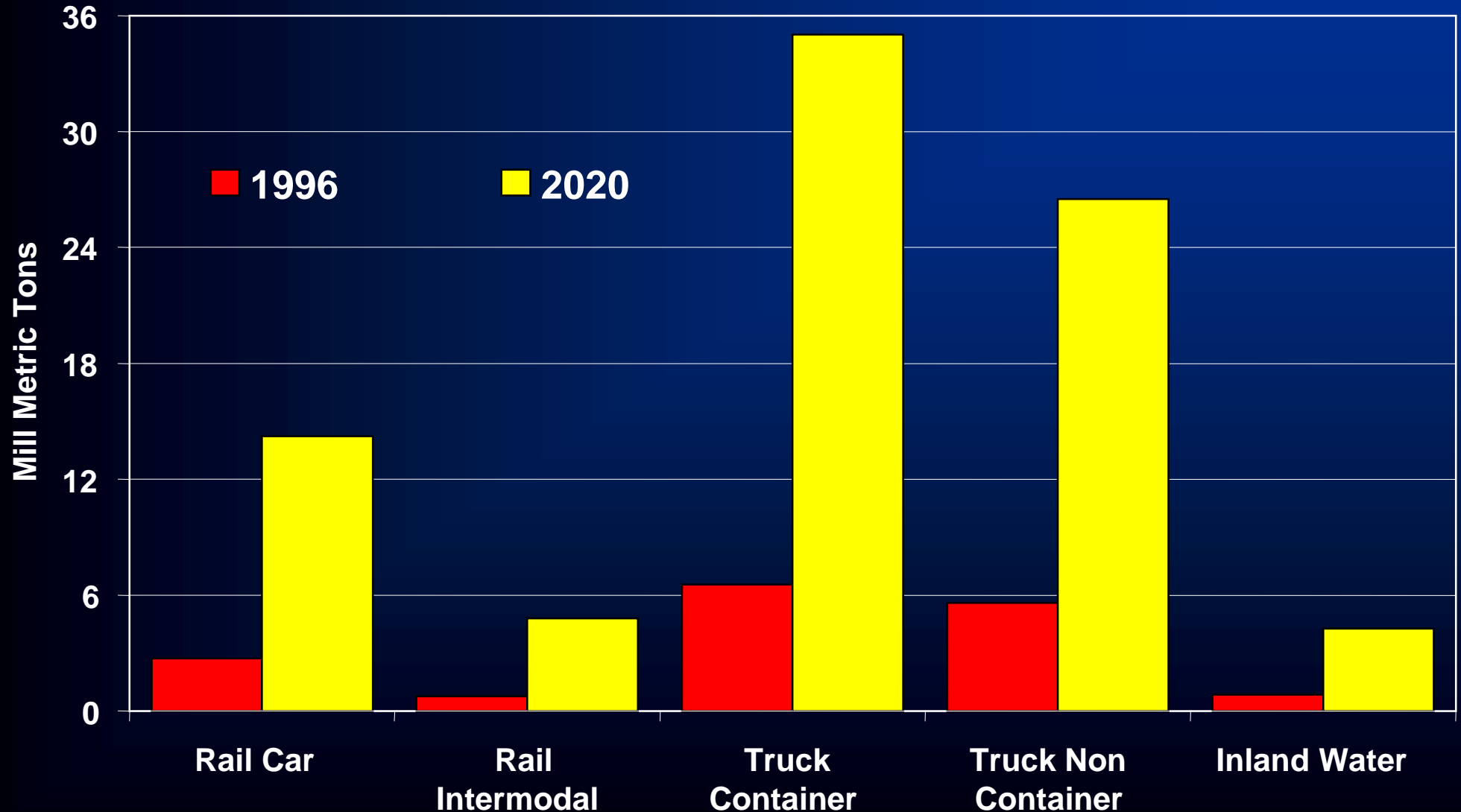
Total Tonnage



2020 Domestic Mode Split

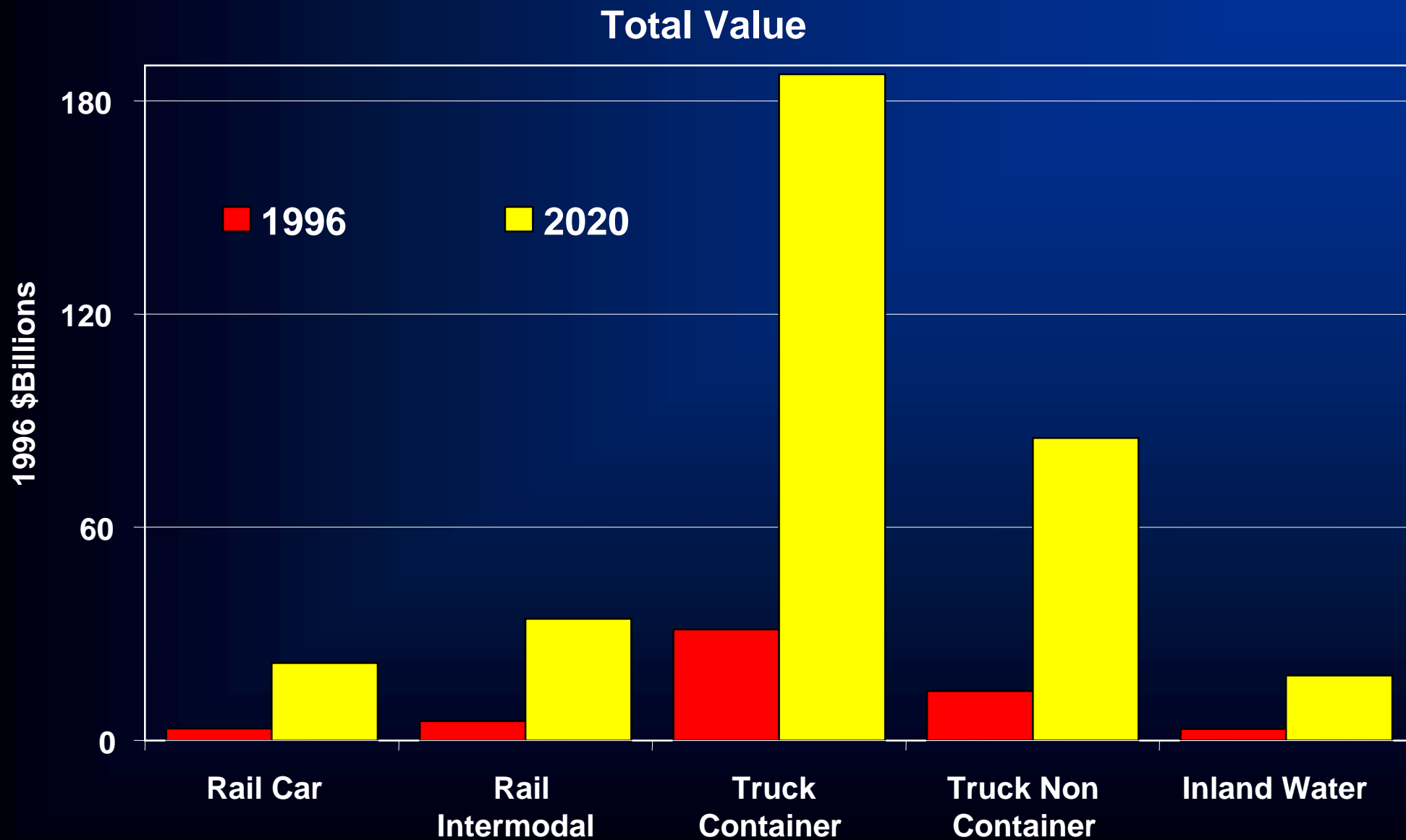
Latin American Trade - Manufactured

Total Tonnage



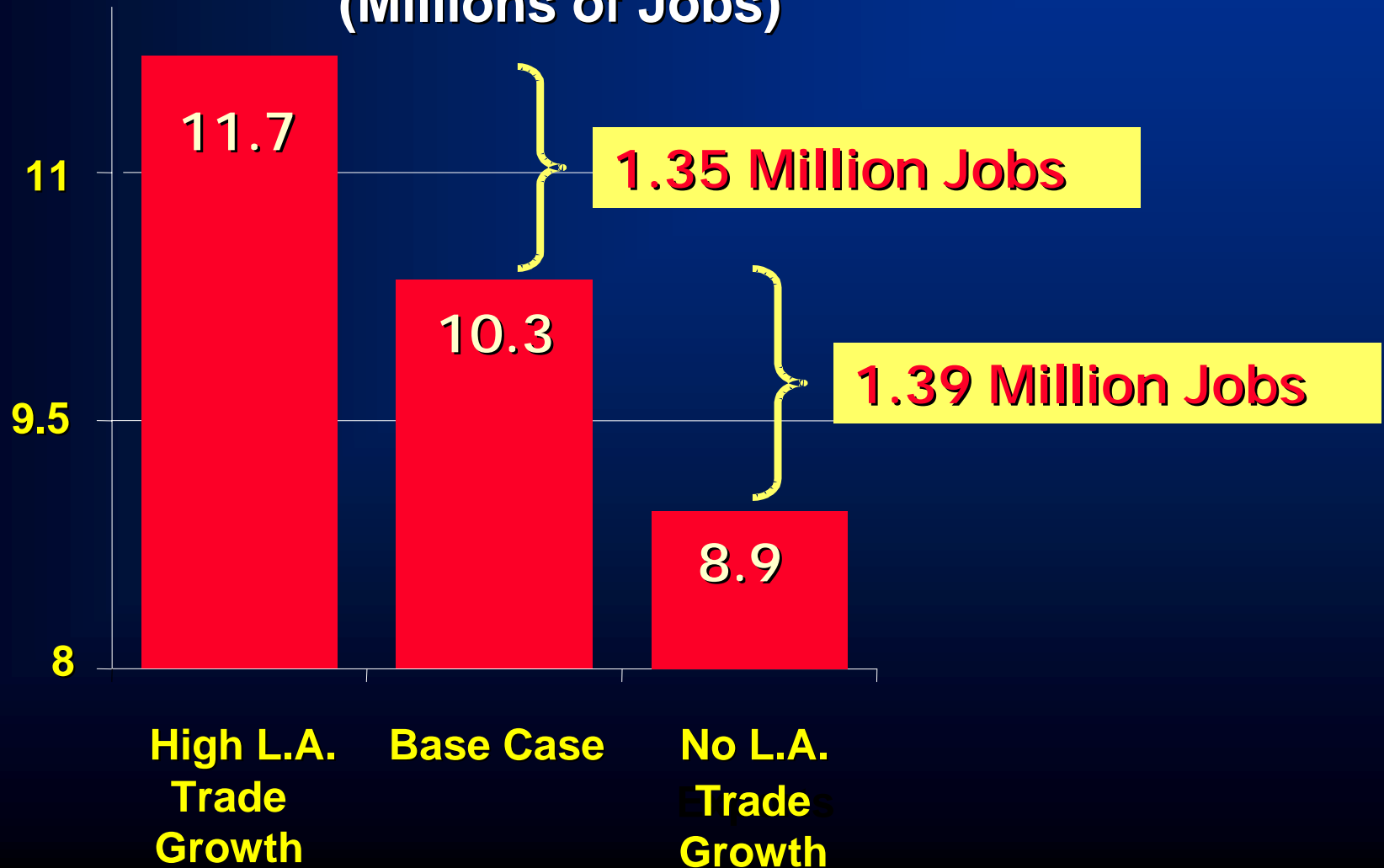
2020 Domestic Mode Split

Latin American Trade - Manufactured



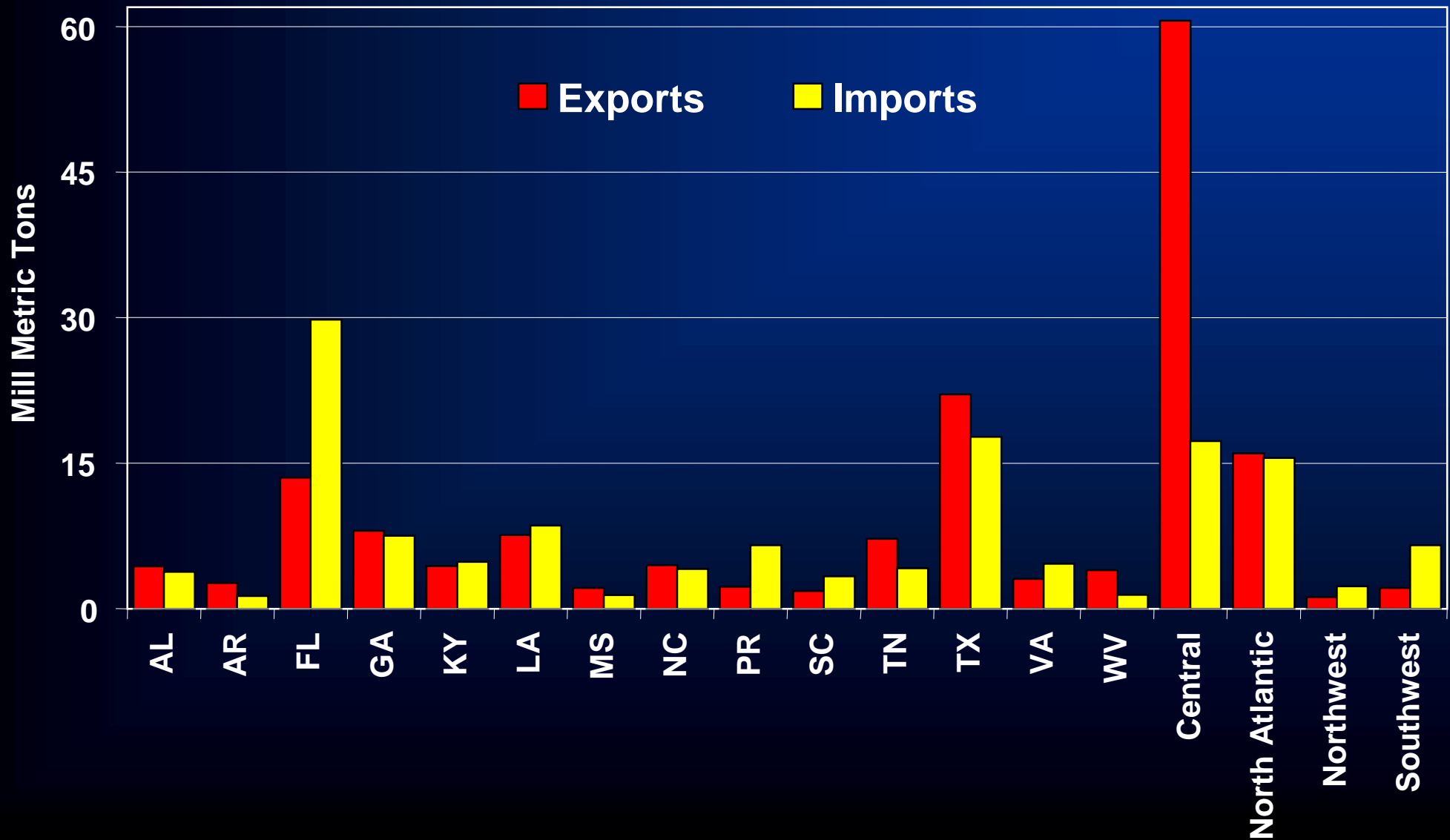
Change in Alliance Employment From 2000 to 2020

(Millions of Jobs)



2020 US Origin/Destinations All Commodities

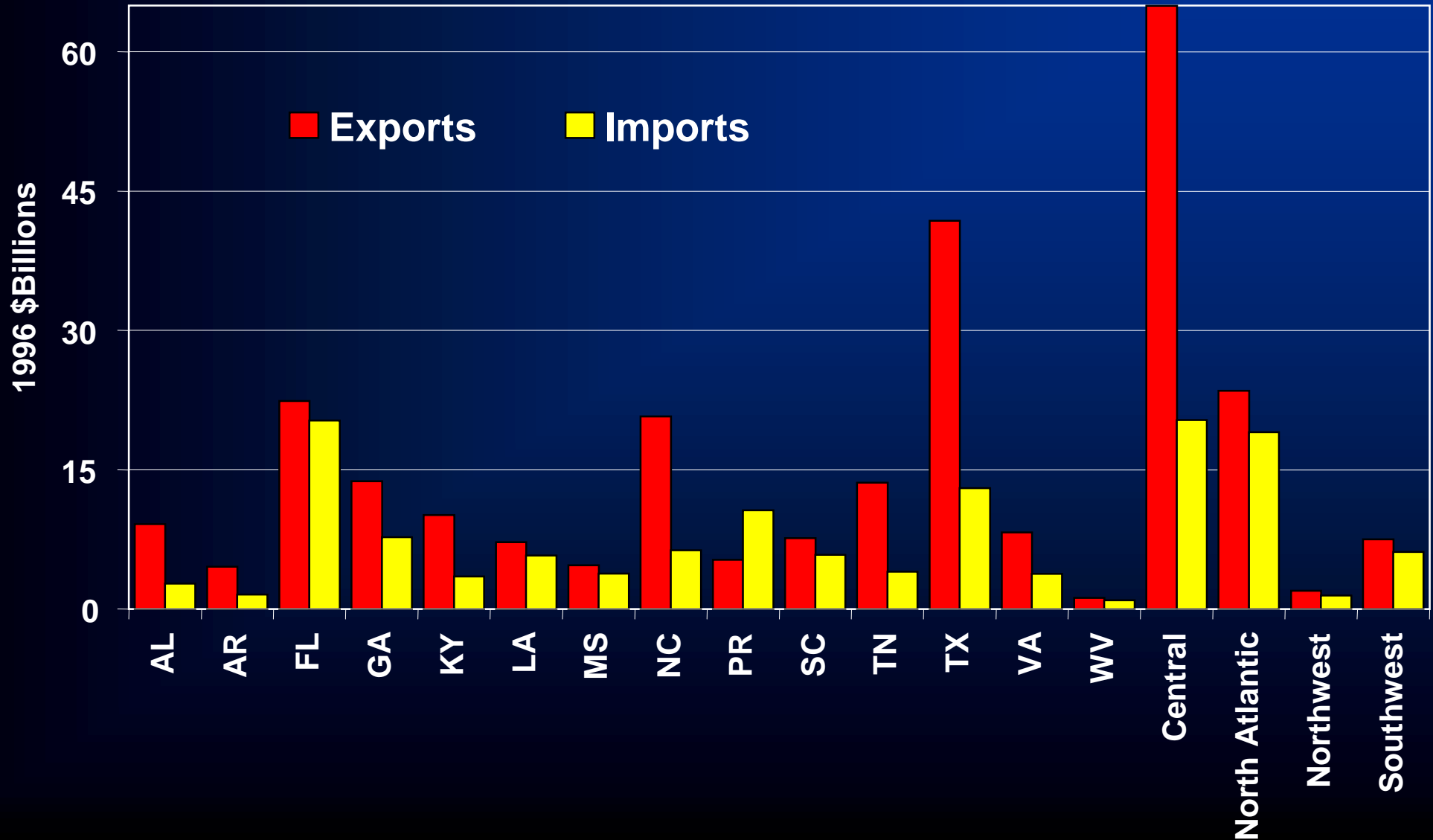
2020 Tonnage



2020 US Origin/Destinations

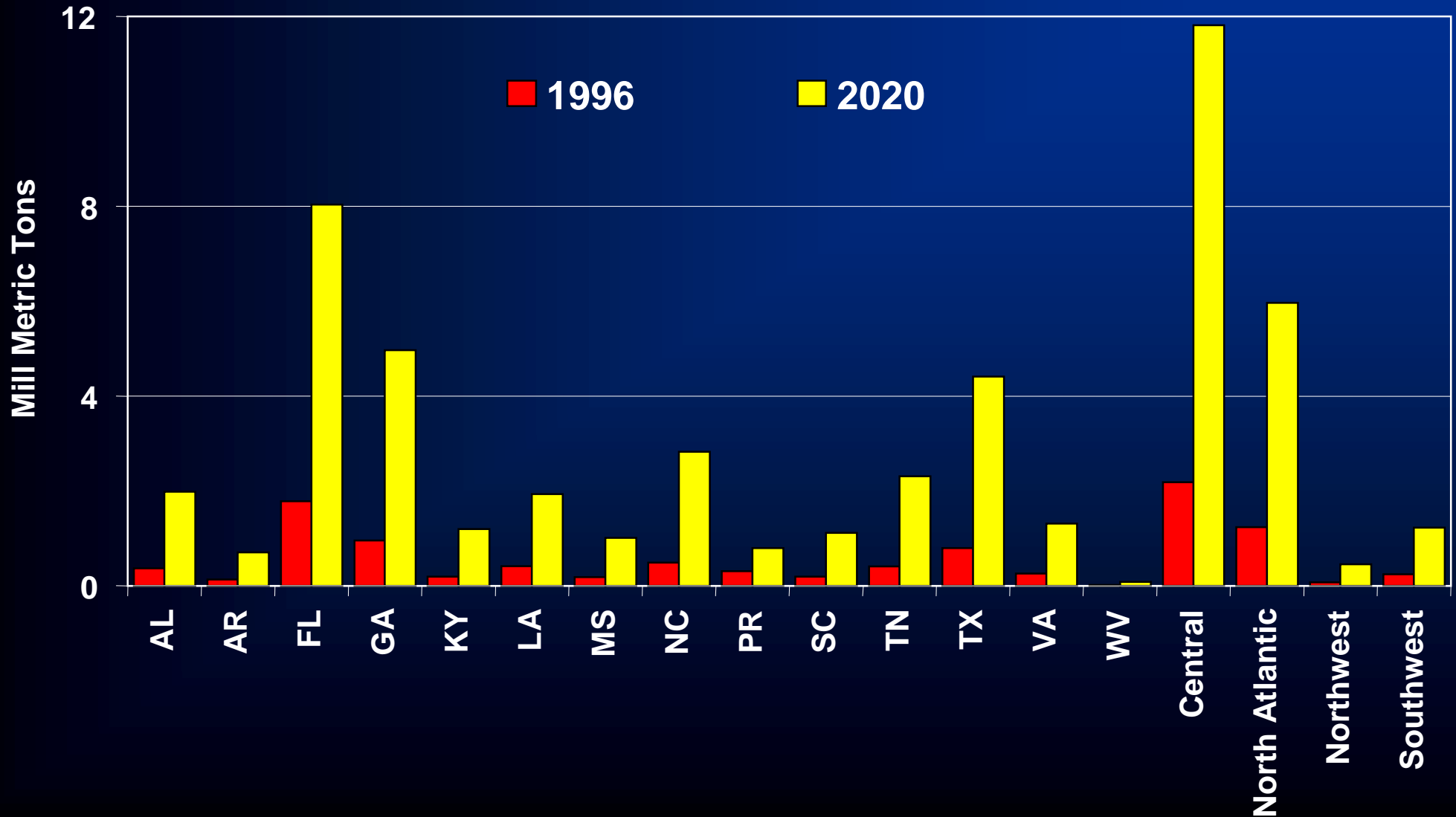
All Commodities

2020 Value



2020 US Origin/Destinations Manufactured

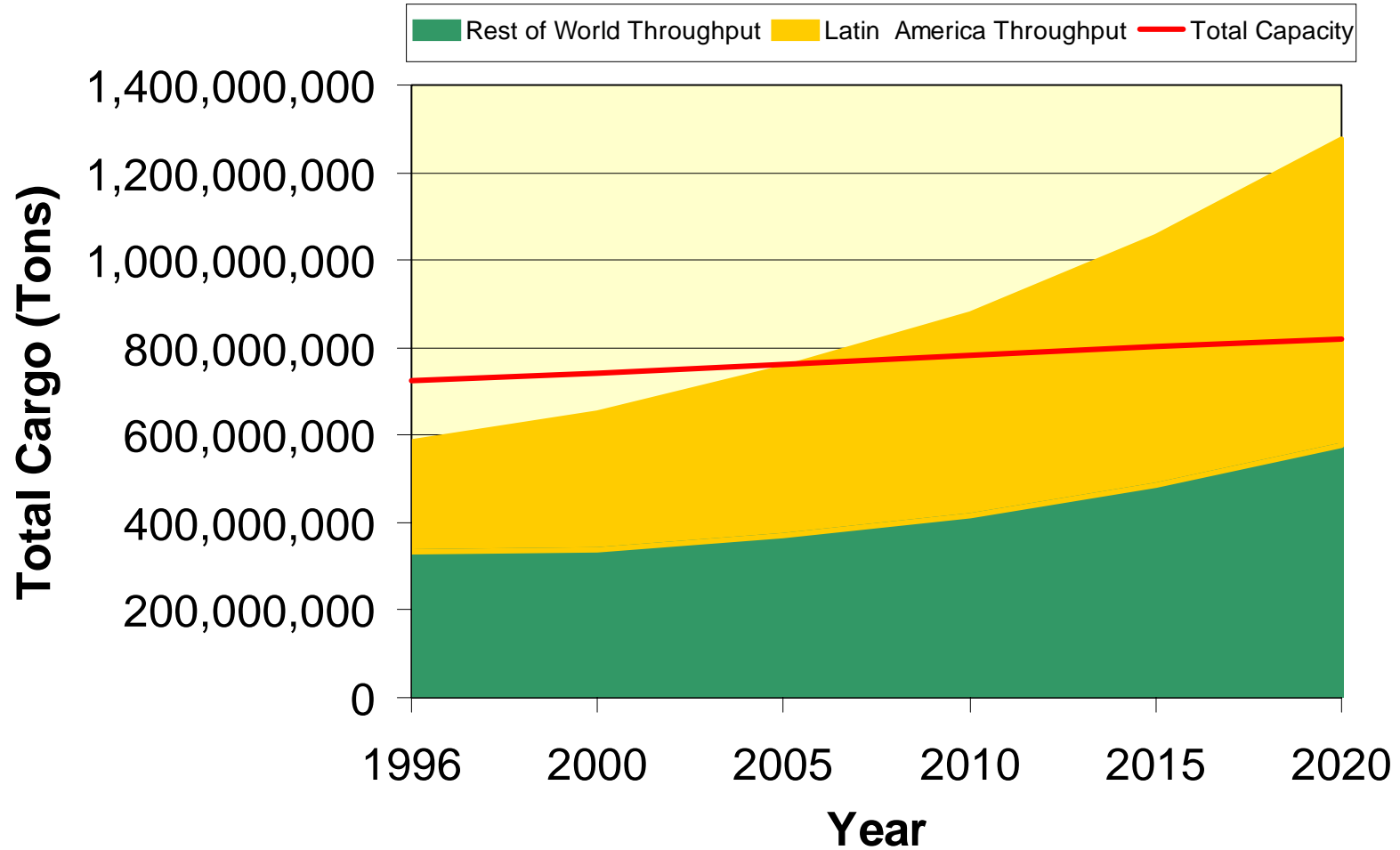
Export Tonnage



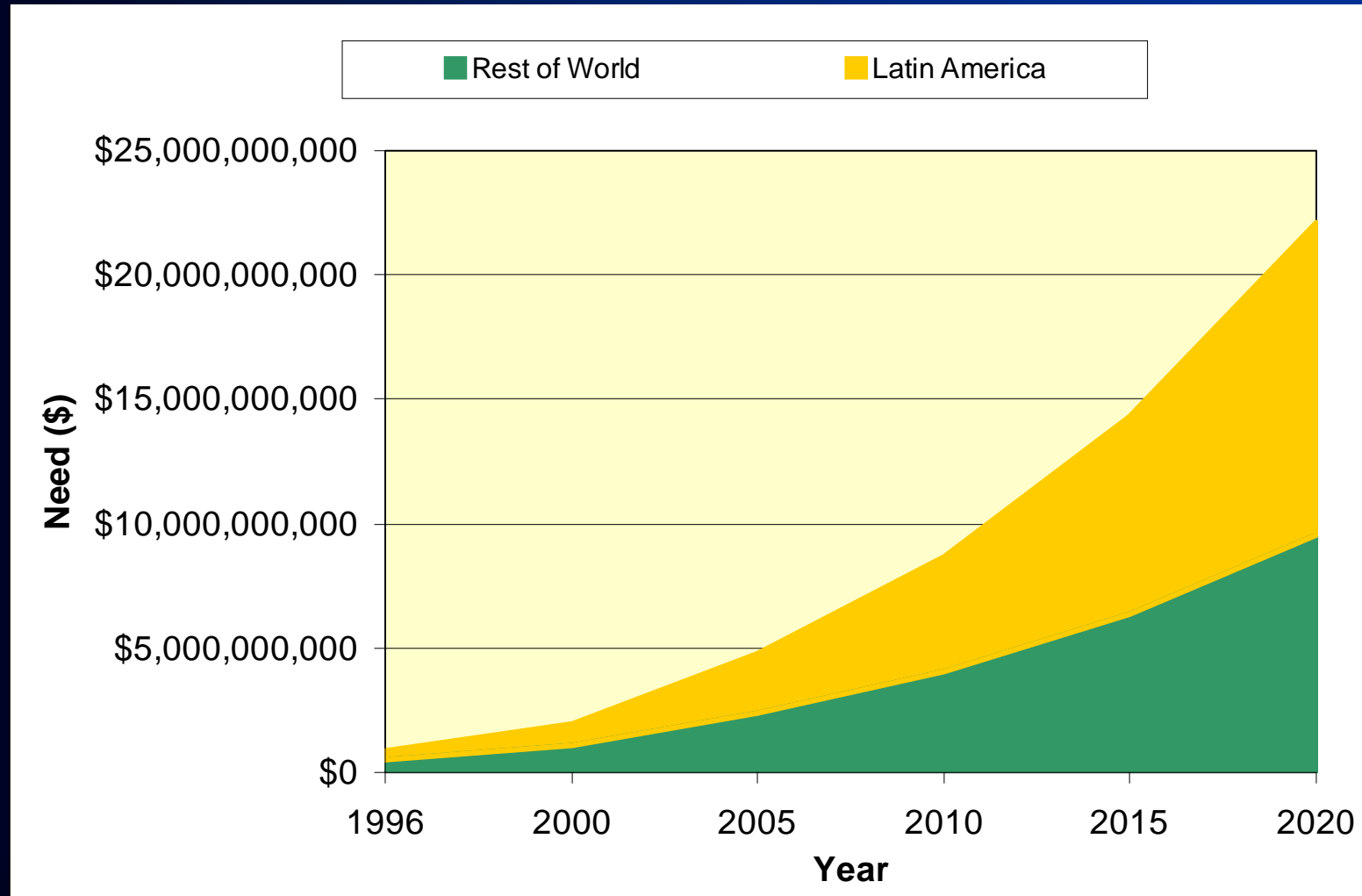
LATTS Strategic System: Water Ports



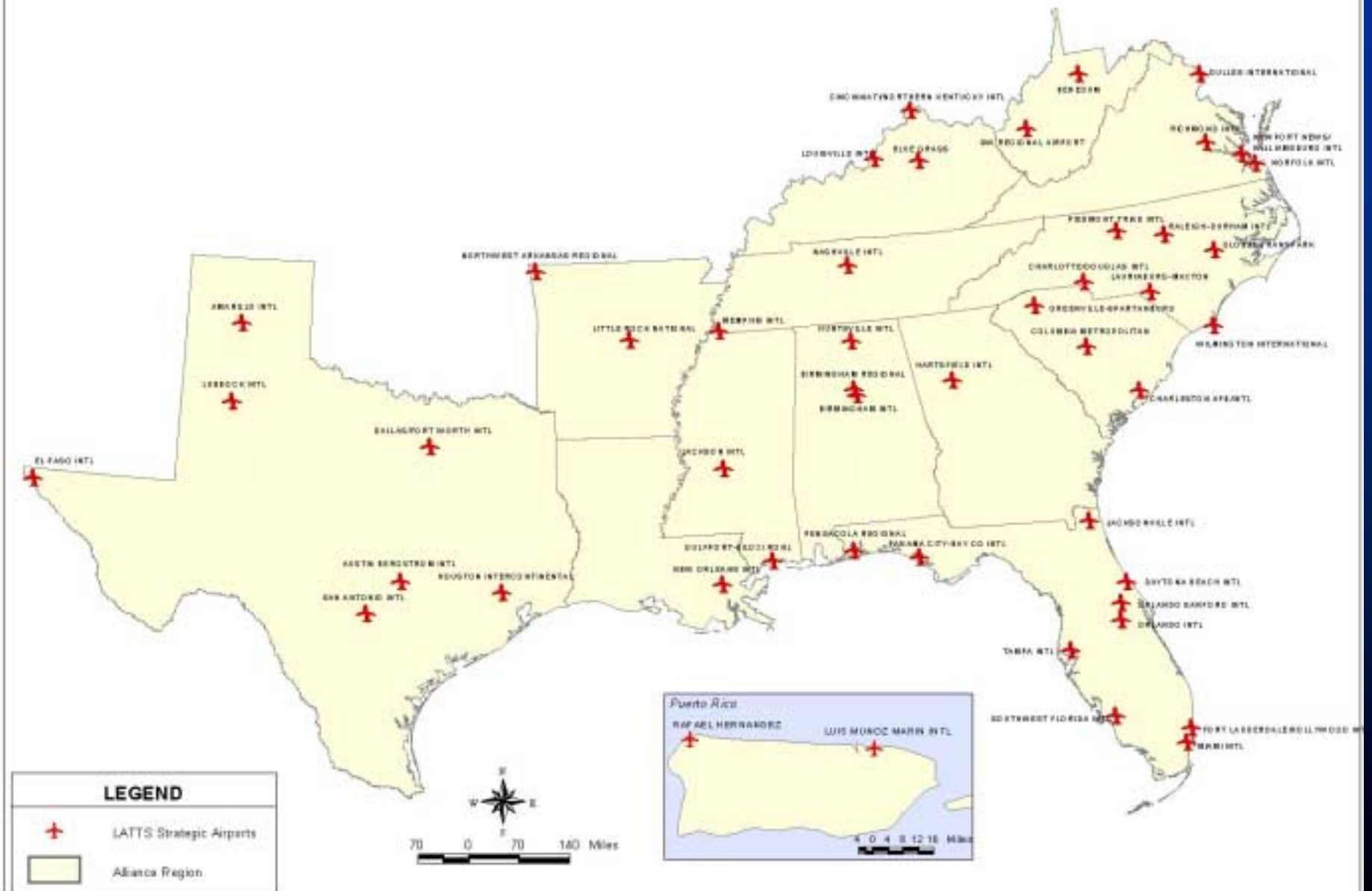
TOTAL REGION CARGO THROUGHPUT vs CAPACITY



TOTAL REGION CARGO NEED ESTIMATED INFRASTRUCTURE NEED



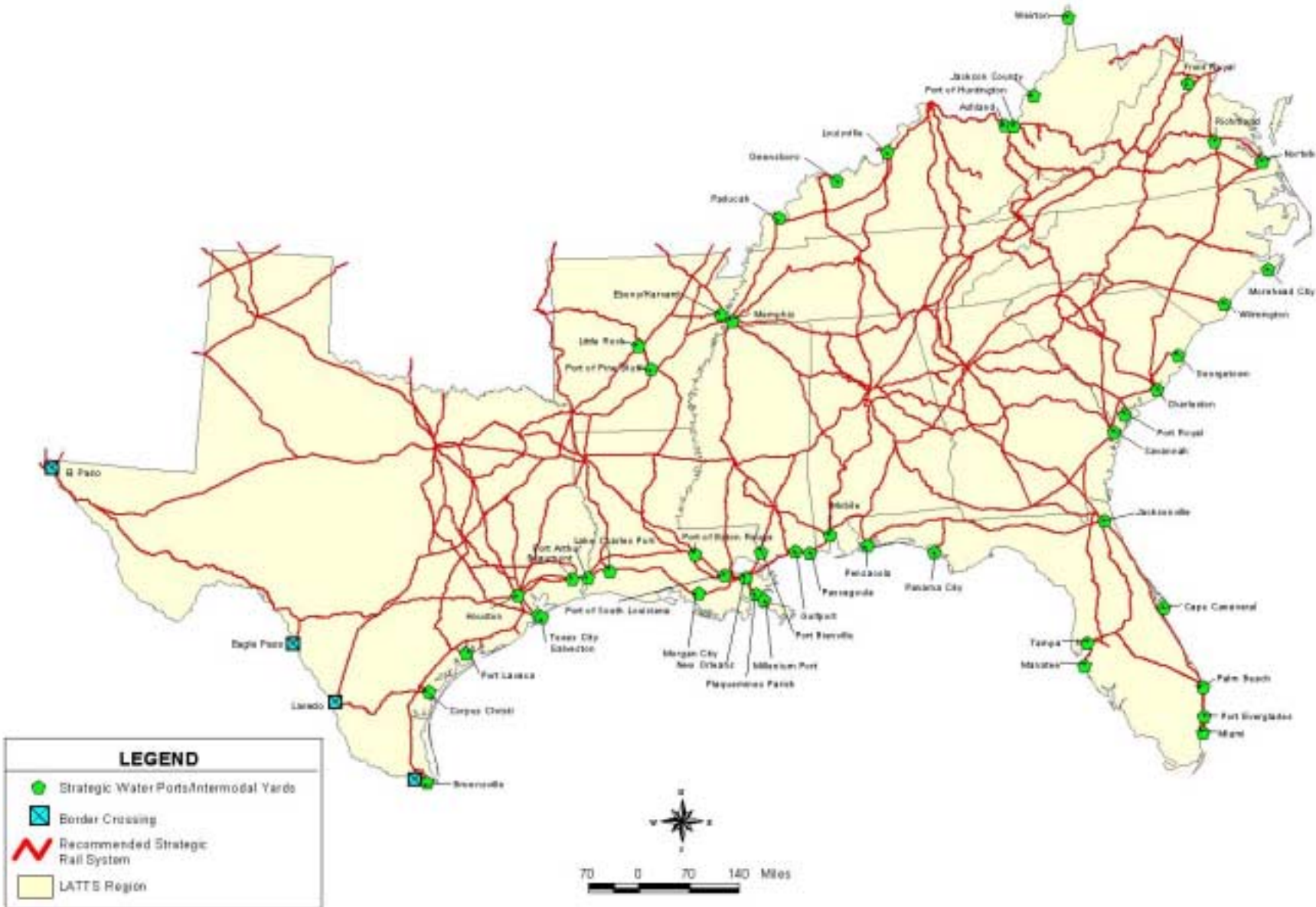
LATTS Strategic Airport System



LATTS Strategic Highway System



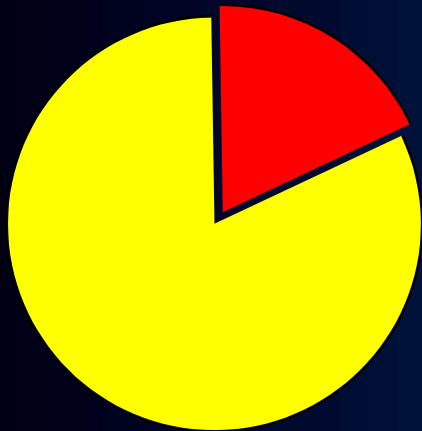
LATTS Strategic Rail System



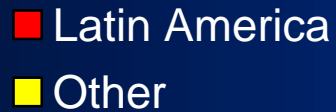
20 Year Needs Estimates

LATTS Strategic System

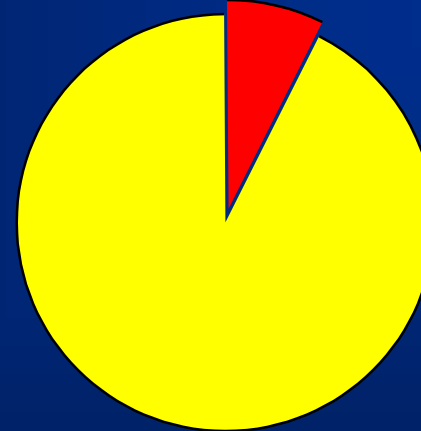
TOTAL 20-YR NEEDS ESTIMATE



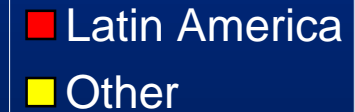
\$92 Billion



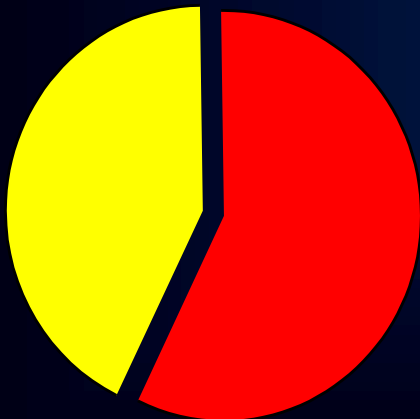
20-YR HIGHWAY NEEDS ESTIMATE



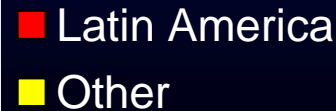
\$67 Billion



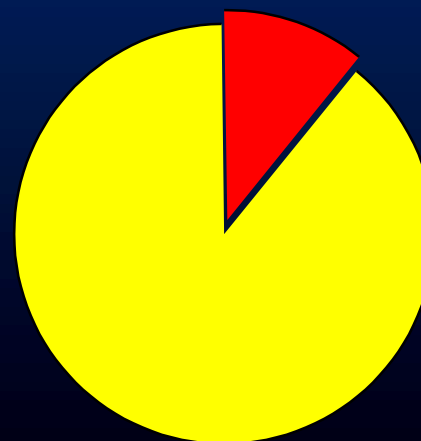
20-YR PORT NEEDS ESTIMATE



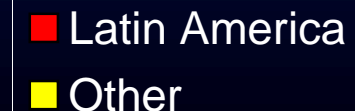
\$22 Billion



20-YR AIR CARGO NEEDS ESTIMATE

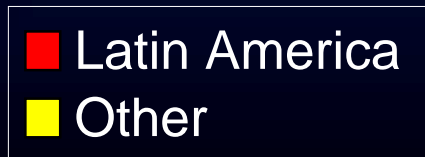
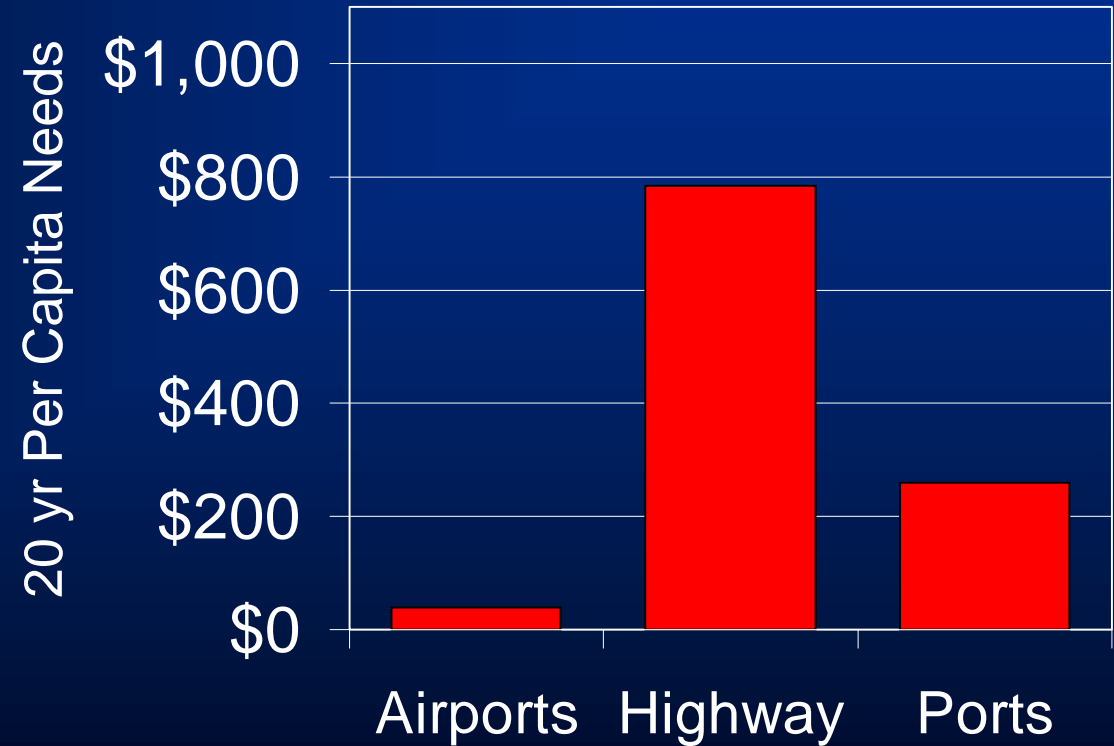
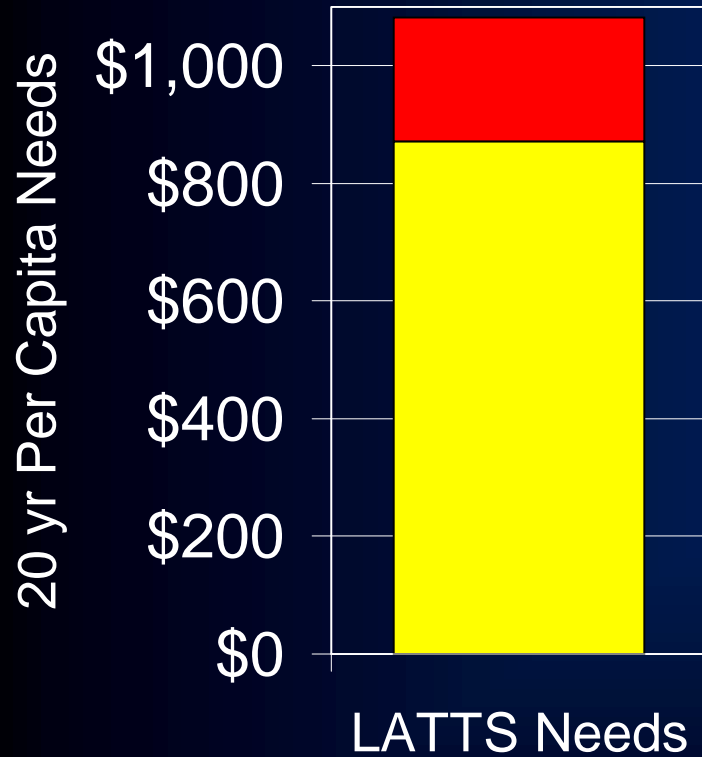


\$3.3 Billion



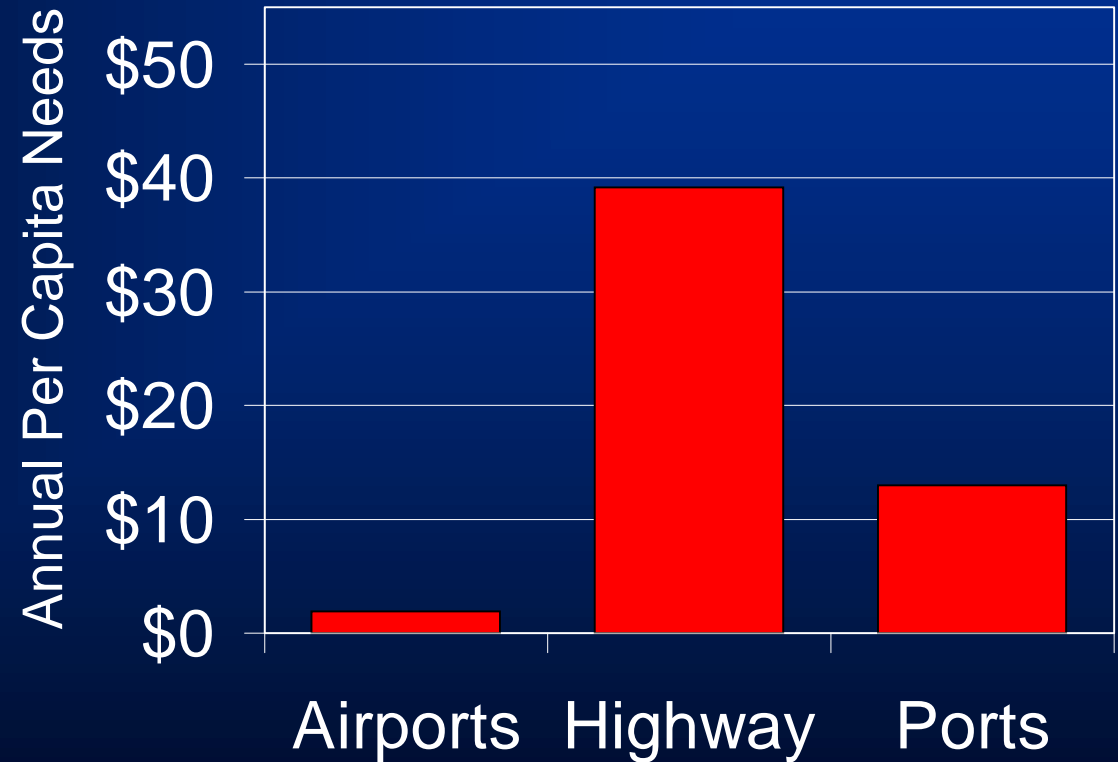
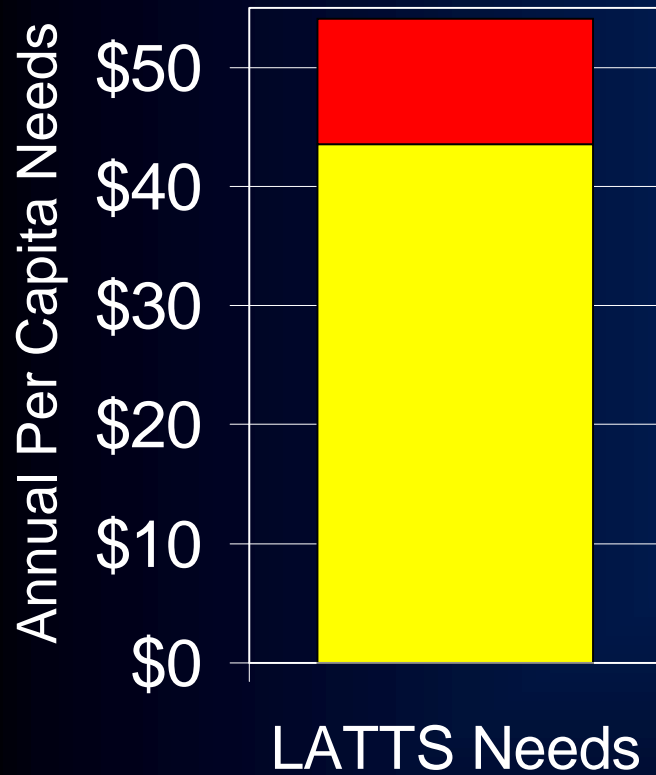
Per Capita LATTS Needs Estimates

20 Year Total



Per Capita LATTTS Needs Estimates

Annual per Capita Average



LATTS Needs vs Industrial Capital Investment

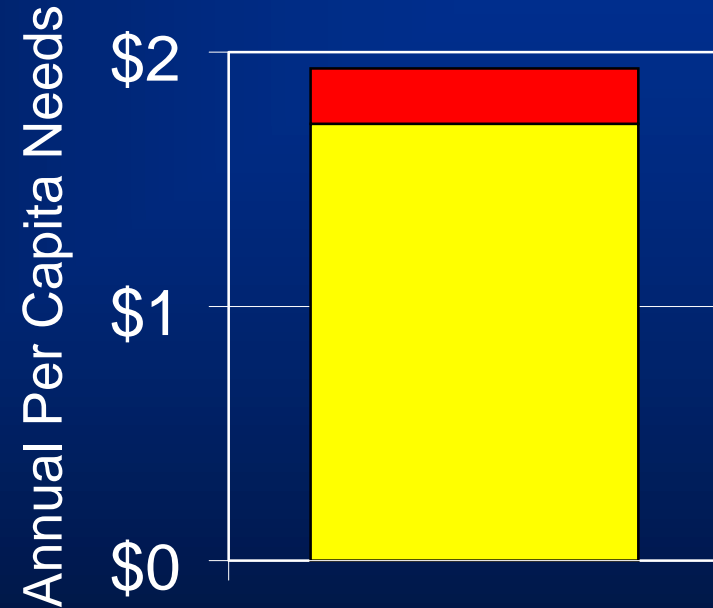
Annual per Capita Average



LATTS Airports Needs Estimates



LATTS Airports
Needs

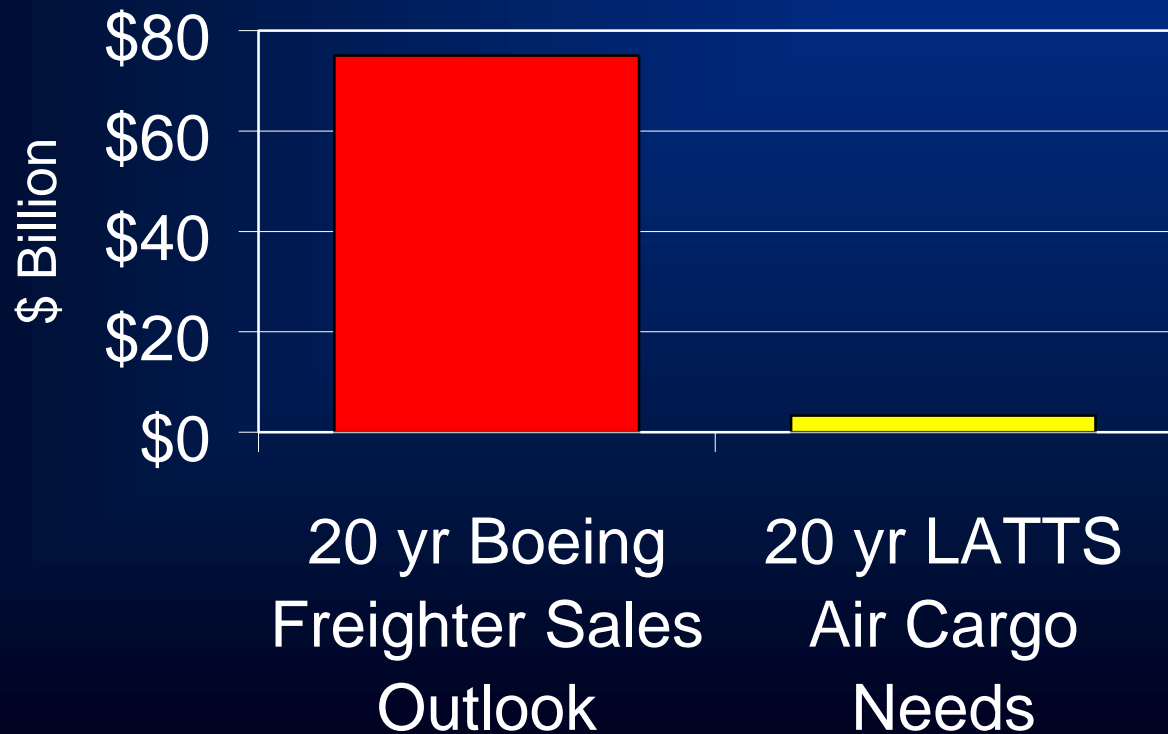


LATTS Airports
Needs

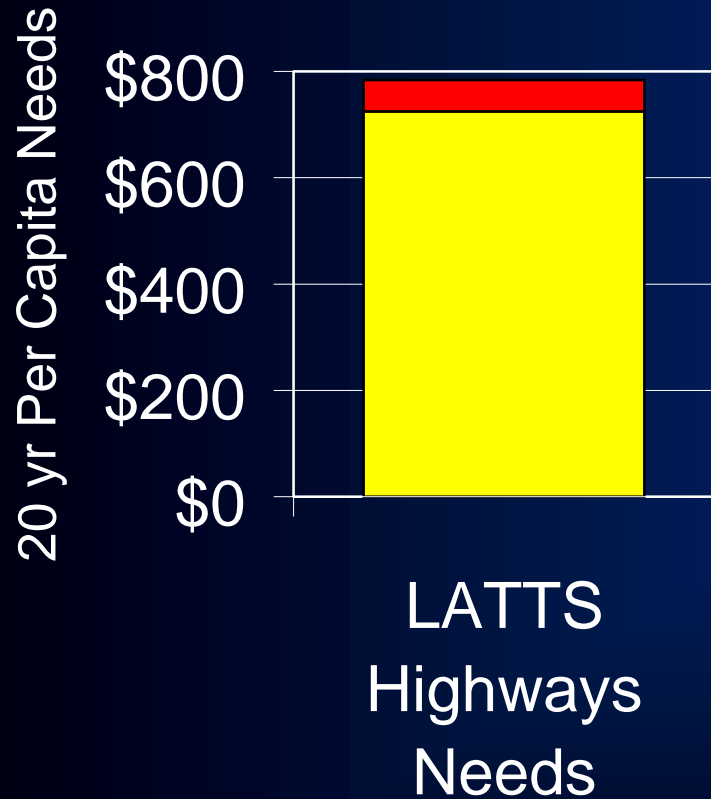


LATTS Airports Needs vs Boeing Freighter Sales

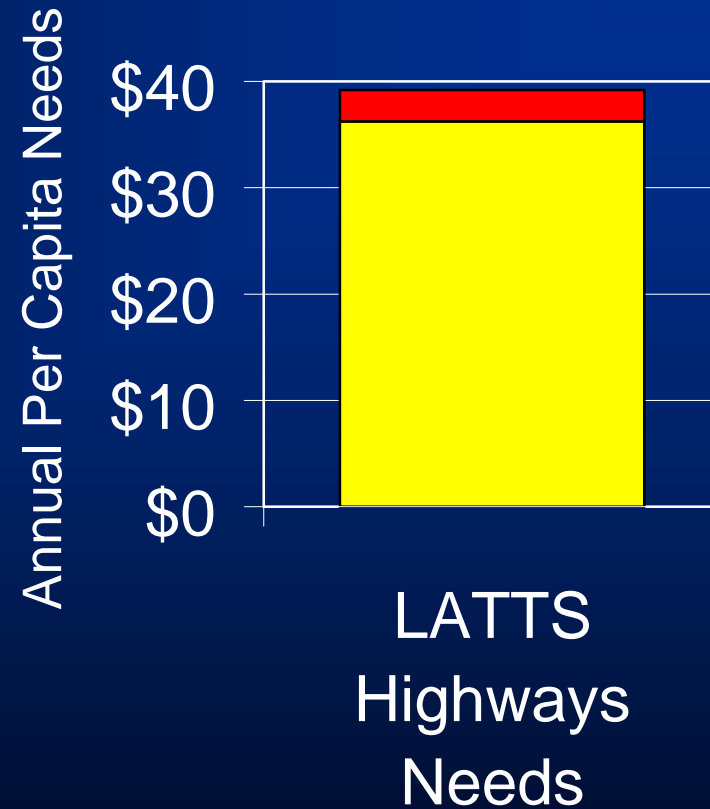
20 Year Outlook



LATTS Highway Needs Estimates



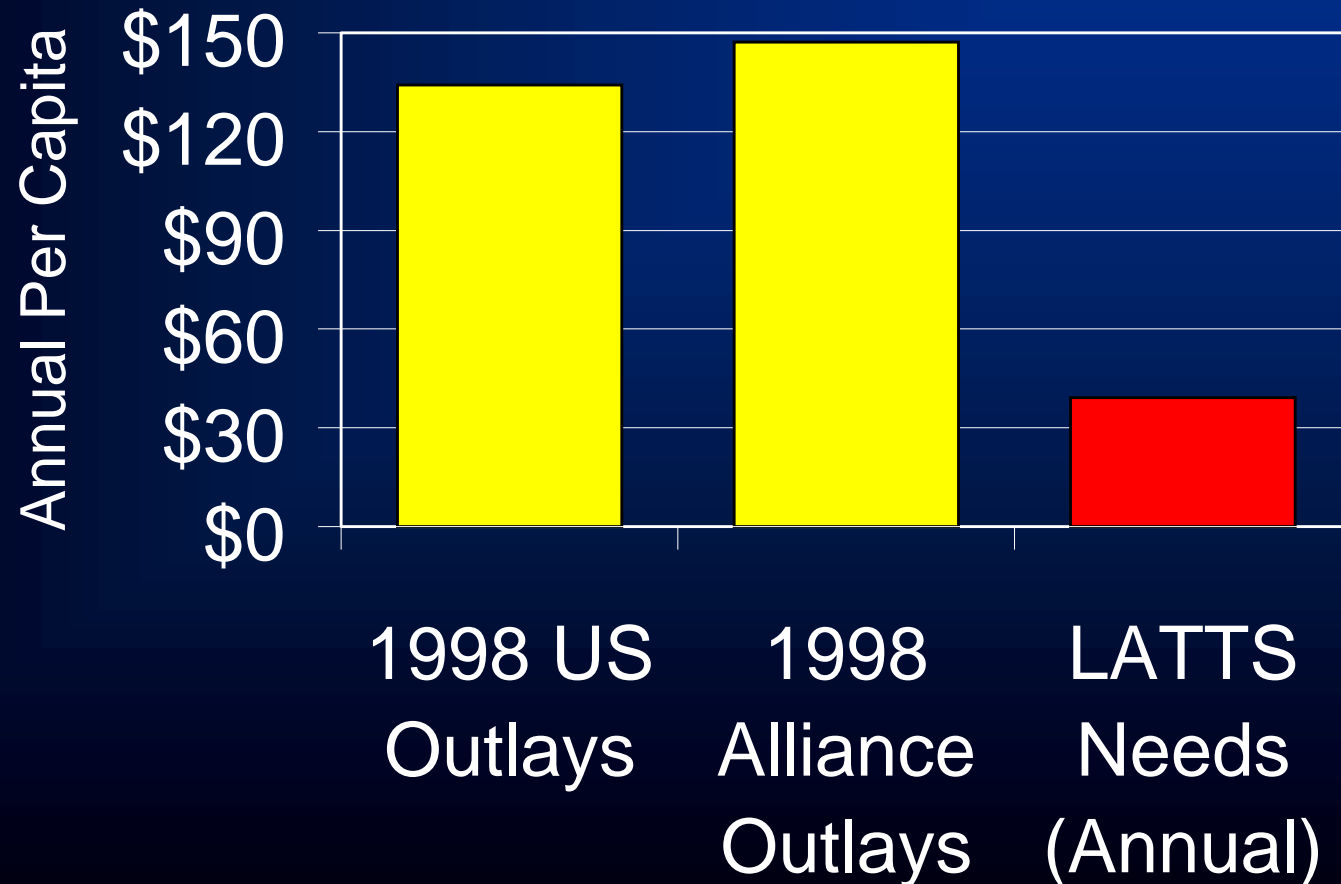
■ Latin America
■ Domestic & other Int'l



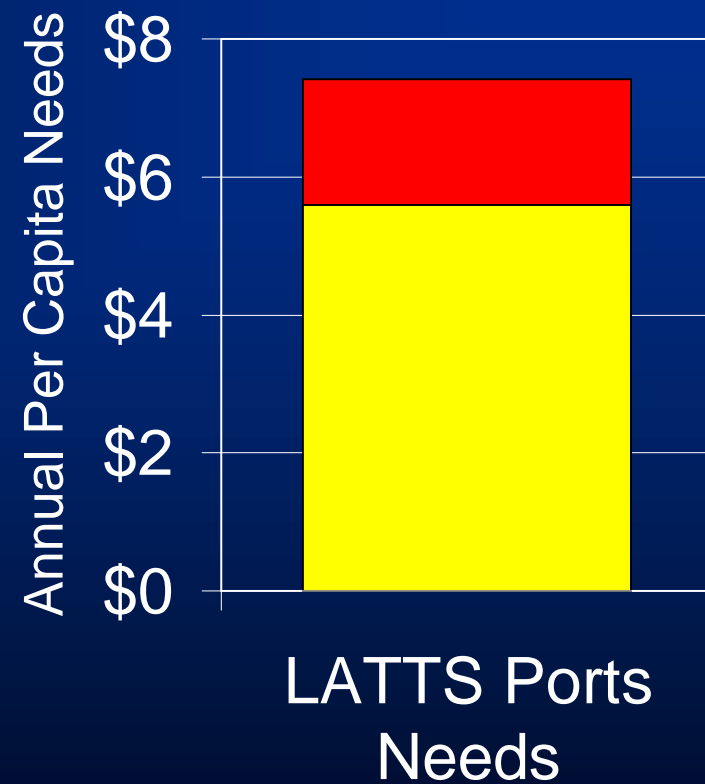
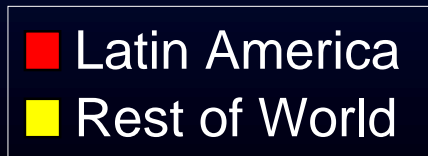
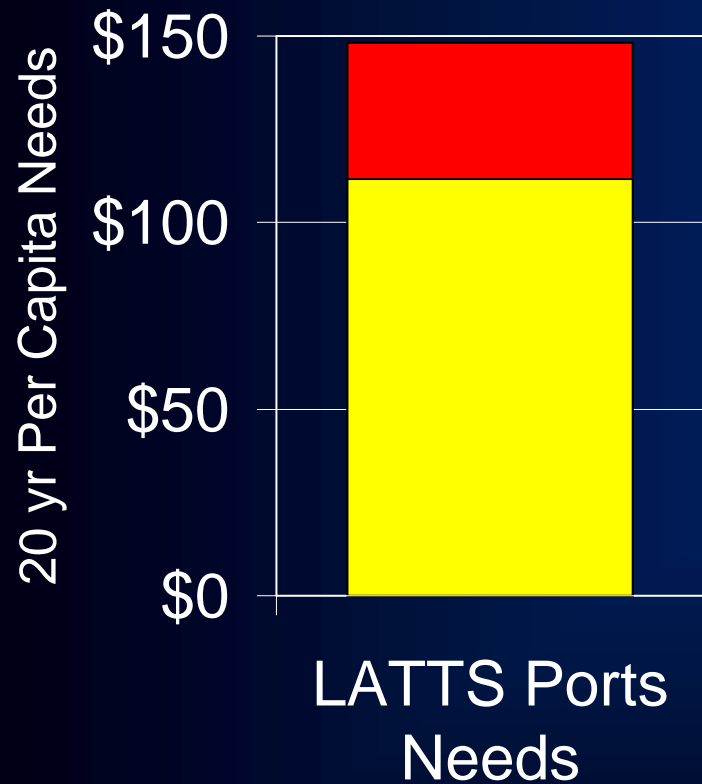
■ Latin America
■ Domestic & other Int'l

LATTS Highway Needs vs Historical Expenditures

Annual Expenditures



LATTS Ports Needs Estimates



Why Latin America?

**LATIN
AMERICAN
TRADE**

Significant enough

Provides the hook

Potentially Adverse Consequences

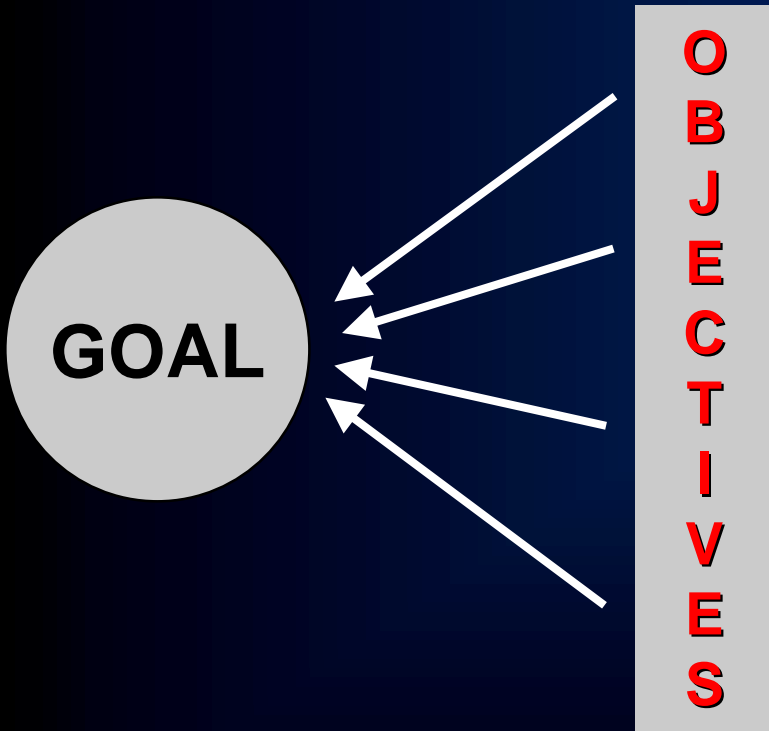
- **Safety**
- **Congestion**
- **Wear and Tear**
- **Environment**
- **Crime**
- **Quality of Life**
- **Rail/Highway Delays**
- **Env./Social Justice**



GOAL

Goal

Support economic development through improved transportation for trade.

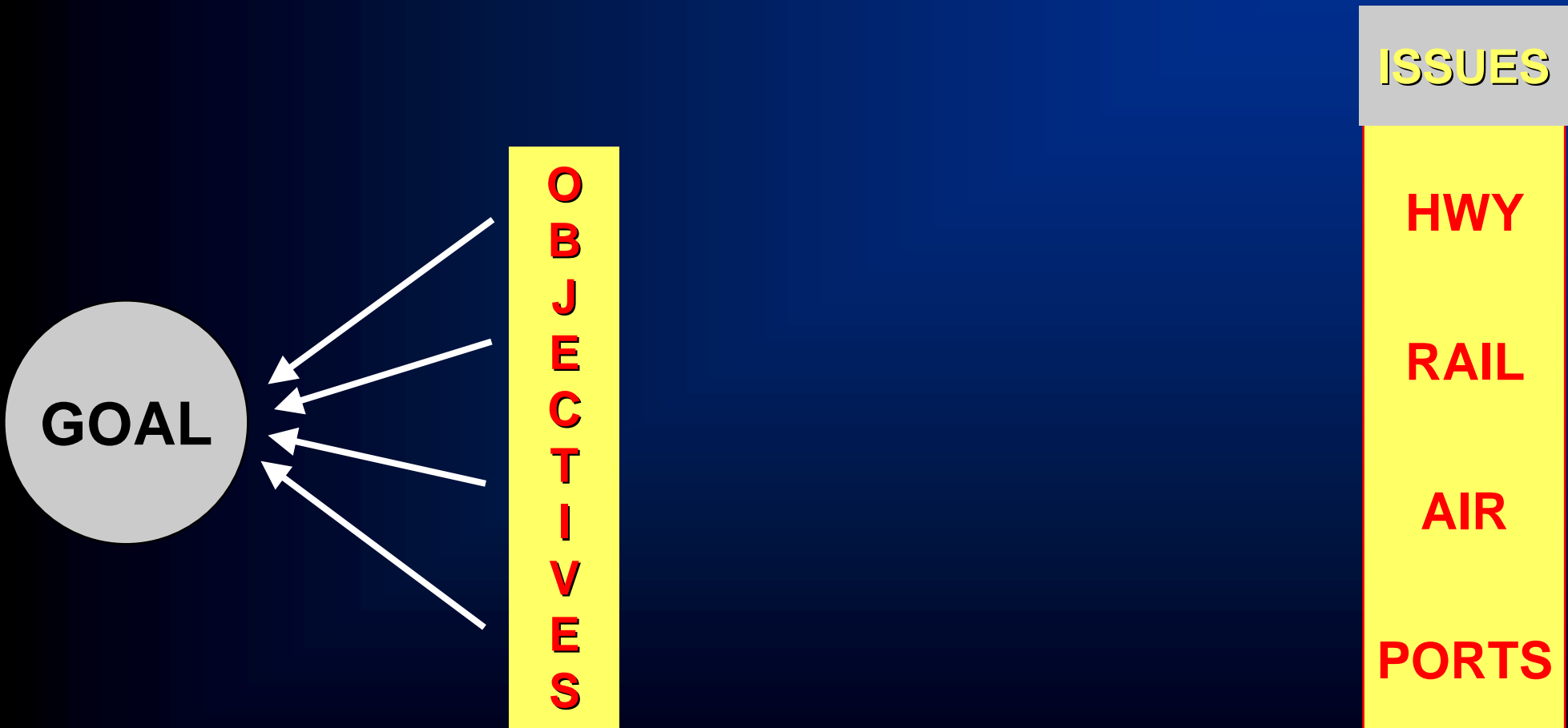


LATTS Objectives



THEMES

- **Systems Approach**
- **Modal Choice**
- **Dynamic Economy**



PORTS-Modal Issues

- Capacity (Physical)
 - Marine
 - Landside Access
 - All Cargo Types
- Efficiency
 - Facility utilization
- Turnaround
- Intermodal System
- Agility

- Competition
 - Ports are competitive
- Operating Environment
 - Future IIC
- Megaload Centers
 - Feeders
- Environment
- Finance
- Jurisdiction

AIRPORTS-Modal Issues

- Cultural
- E-Commerce
- Passenger Service to Latin A.
- Groundside Access
- Seamless Interchange
- Market Linkage
- Custom Clearance/EDI
- Capacity
 - Warehouse & Ramps
 - Airside, Groundside, Satellite

- Clustering on/around airports
- Satellite /Industrial/Warehouse (11C)
- Linkages
 - On-Airport, To Satellites
- Funding
 - Federal, State, other
 - Innovative
- Jurisdictional Issues

RAIL-Modal Issues

- Physical Capacity
 - ROW
- Operational
 - Not in the Southeast
- States have limited jurisdiction
- Grade Crossings
 - Above Grade
- Megaload Centers
 - Consolidation
- Private operations
- Funding

HIGHWAYS-Modal Issues

- **Additional Physical Capacity**

- Urban
- Rural

- **Capacity Constraints**

- Environmental
- ROW
- Traffic

- **Intermodal Connectors**

- **Corridor needs**

- **Operational**

- ITS

- **Congestion**

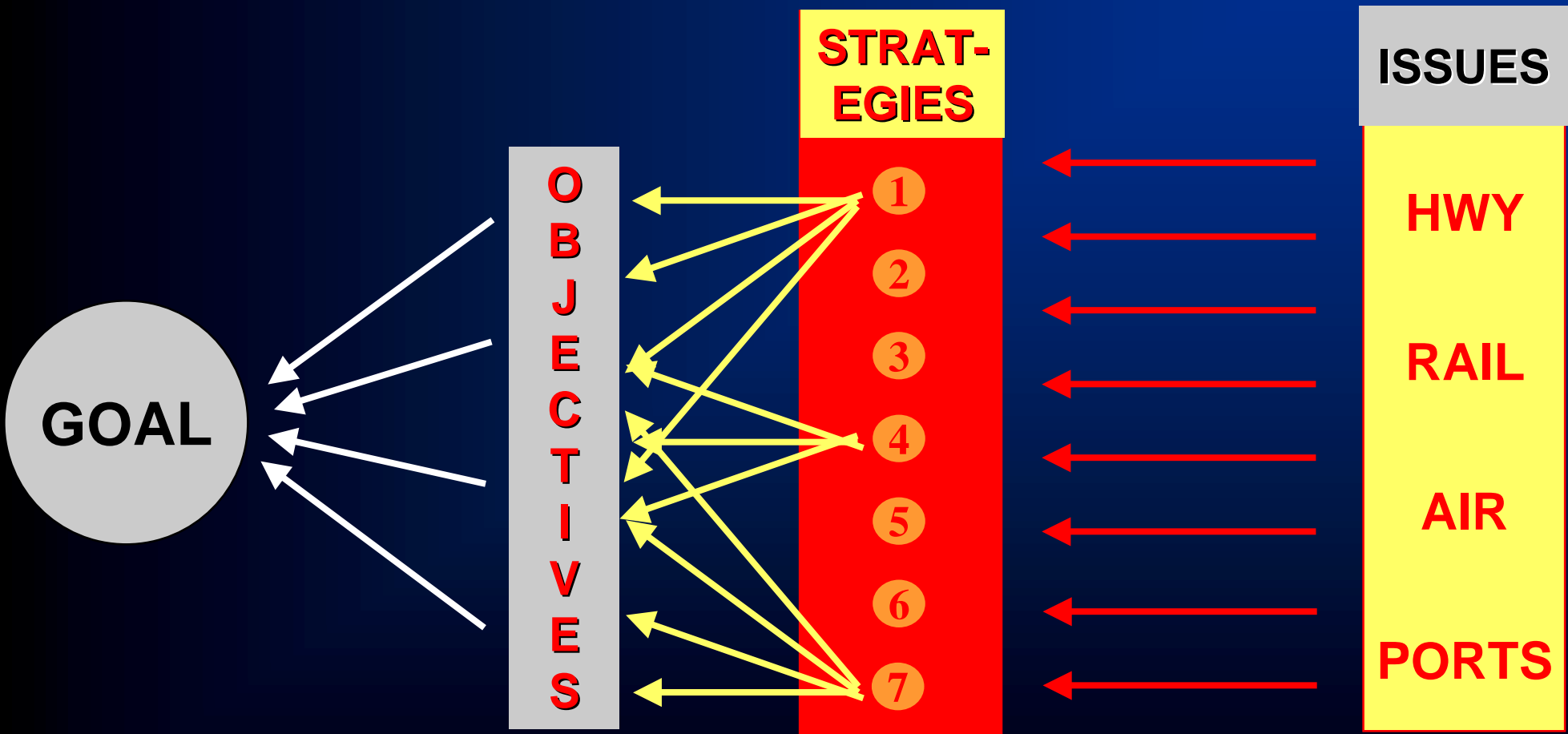
- **Preservation/Rehabilitation**

- Pavement, bridges

- **Safety**

- **Institutional**

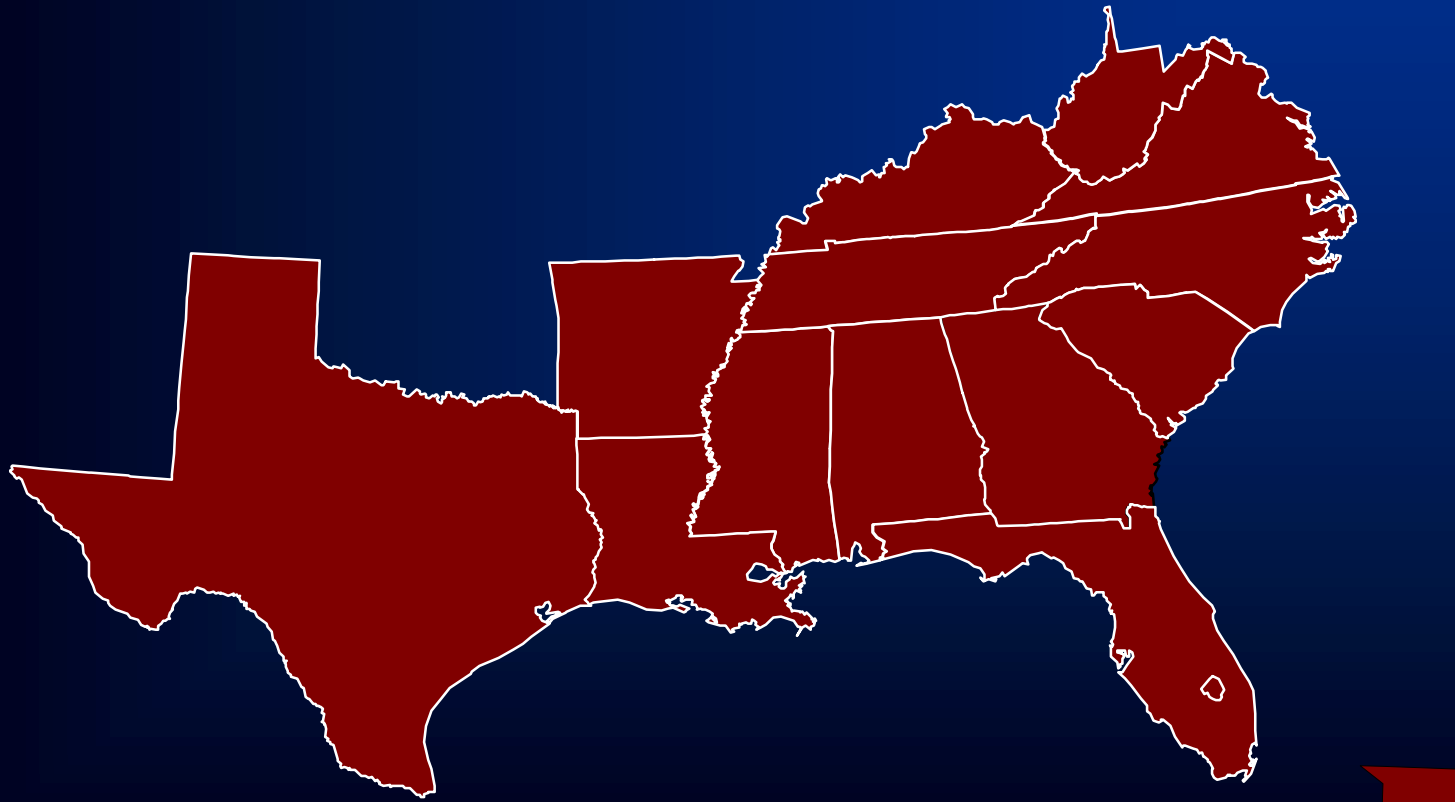
- Standards



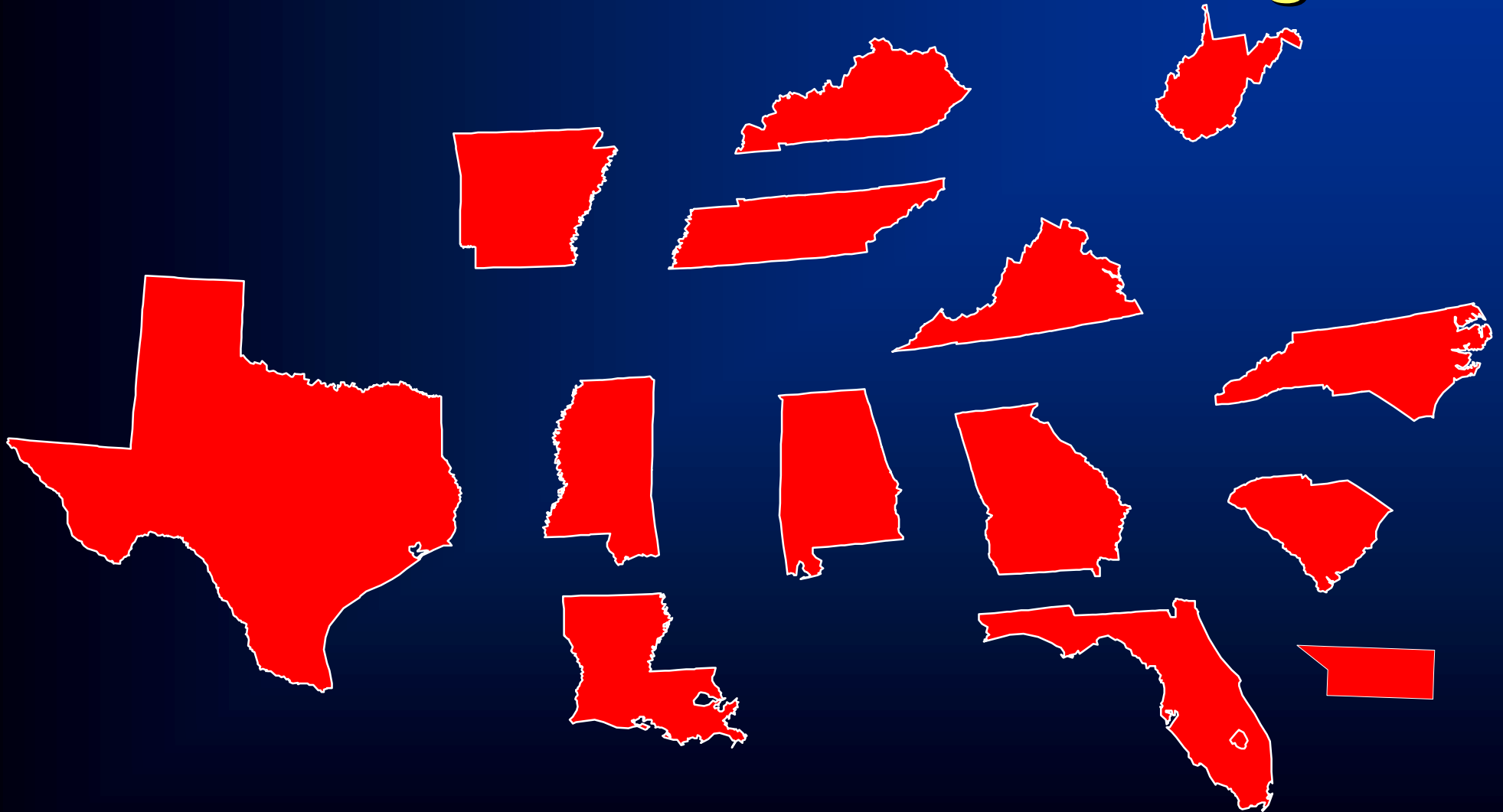
Strategies

- Utilization of Existing Infrastructure
- Add Physical Infrastructure
- Increase Operating Throughput
- Corridor Approach for Investing
- Develop Agile Freight Operations
- Improve Clearance at Gateways
- Attention to Connectors
- Encourage Technology
- Integration of Information
- ITS Applications
- Increase Public Awareness
- Improve Institutional Relationships
- Improve Freight Profile
- Partnerships

Regional Strategy



State/Commonwealth Strategies



LATTS Website



Wilbur Smith Associates
Columbia, South Carolina